

BOOK II

PROMOTION COORDINATOR  
*PROCEDURES*

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## **BOOK II: PROMOTION COORDINATOR**

The Promotion Coordinator (PRC) is charged with administering the Region's Workplan, which involves allocating and ordering promotions, coordinating Value-Added Programs, tracking certain Workplan programs, POS/PDI, and maintaining appropriate files. The PRC is also charged with performing the administrative functions associated with the Coupon Management System

As the Coupon Printer is introduced nationally, Chapters 6, 7, and 8 may be referred to less often. However, because only a limited number of printers will be available initially, these chapters remain important for situations when coupons are ordered via SMS.

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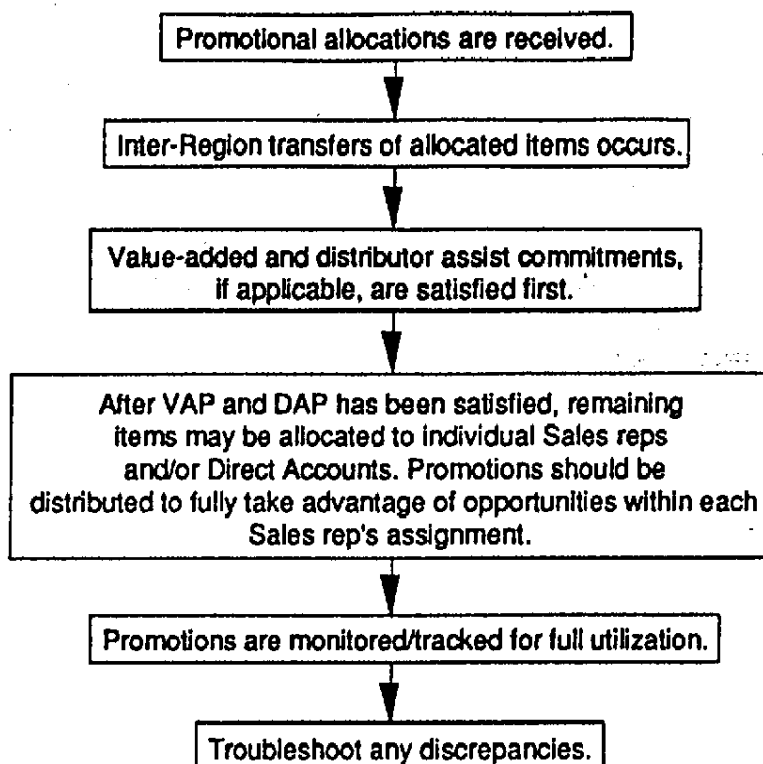
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## COORDINATING THE WORKPLAN

### Workplan Flow

Before the Promotion Coordinator can handle the administration of Workplan activities, they must understand the logic and flow behind the allocation process. In the allocation of virtually all promotional items, the following actions will occur.



◆ **OBJECTIVE:** All allocated items will be distributed efficiently to satisfy individual account and territory needs.

- **WORKPLAN** - All materials utilized to promote RJR products at retail. This includes promotions, coupons and advertising materials. The Workplan is an organized approach which communicates the what, where, when, why, and how of retail program implementation.
- **POS** - Point-of-Sale paper advertising materials used by the field to create impact and visibility for RJR brands at retail. Examples include posters, shelf strips, riser cards, canopy cards, and more.

### Terms and Definitions

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Kelly's

- **PDI** - Advertising materials designed to be Permanent, Dominant and Impactful. These advertising terms are designed for long-term placement. Examples include clocks, neon signs, ground mounts, grocery baskets and business hour signs.
- **NATIONAL MARKETING INDICATORS** - Numerical values input by sales reps which reflect, by individual retail account, the total number of units an account could sell of a given promotion type. Promotion types are:
  - **BSGSF** - Any Buy -Some-Get-Some-Free promotion. For example, Buy One Pack, Get Another Pack Free, or Buy Two Packs, Get One Free.
  - **PACKAGE PREMIUM** - Any promotion offering a premium with the purchase of individual packages of RJR product. Can come in 1, 2, 3, 4 and 5 pack offers.
  - **PACKAGE COUPON** - Any promotion offering a coupon discount with the purchase of individual packages of RJR product. Coupons redeemed at store level, with reimbursement to stores after submission to RJR.
  - **PACKAGE VPR** - Similar to coupons, these VPR's discount the price of packs; however, reimbursement for this discount is normally handled by sales reps at store level.
  - **CARTON PREMIUM** - Any promotion offering a premium with the purchase of one or more cartons of RJR product.
  - **CARTON COUPON** - Any promotion offering a coupon discount on one or more cartons of RJR product. Again, retailers receive reimbursements by submitting coupons to RJR.
  - **CARTON VPR** - A discount of the carton price of RJR product; Sales Reps reimburse the account directly.

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For each brand of Full Price cigarette RJR produces, Sales Reps enter the quantity of each of the above promotion types the account could sell in a given period. These quantities are National Marketing Indicators.

- **ASM - Account Specific Marketing** - A strategy utilized by sales reps and management which analyzes each account to determine the unique promotional opportunities present. ASM focuses not just on sales of RJR products, but also competitive products. This allows the Field to target certain promotion types where they can be most effective.
- **VALUE-ADDED PROGRAMS** - Programs designed to utilize Direct Accounts to pack and ship promotions sold by RJR personnel.
- **DISTRIBUTOR ASSIST PROGRAMS** - Programs designed to utilize Direct Accounts to sell, coordinate, and place promotions in low-volume calls not normally contacted by Field Sales. The difference between DAP and VAP programs is DAP requires the Direct Account to handle the entire process, from selling to placement. With VAP, RJR personnel sell the promotions - the Direct Account is required to simply ship it.
- **DRIVE PERIODS** - Time frame in which a given promotion will be worked. There are normally three drive periods per quarter — one a month.
- **ALLOCATION TRANSFERS** - Each Division is allotted promotions based on the needs of retail accounts within the Division. However, VAP/DAP programs often ship promotions into other Divisions/Regions. Because a Division is only given promotions for their retail accounts, it is necessary to request transfers of promotional items from other Divisions who will receive VAP/DAP shipments.

For example:

Division A has a VAP Direct Account which will be shipping a total of 50 Camel Lighter displays for its retail calls. Of those 50 accounts



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20 are in Division A

17 are in Division B

13 are in Division C

Division A will need to request 17 and 13 displays from B and C, respectively.

## Obtaining Initial Workplan Information

### SMS Report 806

- I. The PRC obtains the Quarterly Workplan for all Divisions/districts in the Region. The Workplan information contains specifics regarding programs, timing and quantities.

Information is obtained via SIS Workplan Report 806 and SMS Workplan Communication Report 570.

1. With the SIS Main Menu displayed, place an "X" beside PRINT REPORT and press [ENTER].
2. The PRINT REPORT MENU will be displayed. Place an "X" beside HISTORICAL REPORT SELECTION MENU and press [ENTER].

```

GHCHGOMN                PRINT REPORT MENU                05/13/93 15:19:31

- DAILY SALES REP DETAIL CALL REPORT      - MASTER ACCOUNT LIST
- BRAND INVENTORY REPORT (*)              - CHAIN MASTER ACCOUNT LIST
- BRAND DISTRIBUTION REPORT (*)            - WHOLESALE PRODUCT LINE LISTS
- PROPOSED ALIGNMENT REPORT                - BRAND DIST BY CALL CLASS (*)
- ACCOUNT COVERAGE EXCEPTION REPORT        - MONTHLY RETAIL COVERAGE REPORT
- ACTIVITY SUMMARIES REPORT                - CONTRACT SUMMARY REPORT
- ACCOUNTS NOT CONTACTED REPORT            - MERCH/ACCT MKT SUMMARY REPORT (*)
(X) HISTORICAL REPORT SELECTION MENU      - CHAIN NON COMPLIANCE REPORT
- REFERENCE SCREENS MANUAL                - SALES ADDRESS LABELS
- CONTRACT PAYMENT-INQUIRY RPT             - CHAIN STANDARD INFORMATION
- CONTRACT PAYMENT-BY ACCOUNT NO.          - HH-BRAND TO BRAND NAME REPORT
- CONTRACT PAYMENT-ALPHABETICAL NAME       - COUPON MANAGEMENT ACTIVITY DETAILS
- CONTRACT PAYMENT-CHAIN BY TERRITORY      - COUPON MANAGEMENT INVENTORY REPORTS
- SCANNING DISPLAY REPORT                  - CPN PLACEMENT/INVENTORY RECON RPT
- CPN-MGT INTER-DIVISION TRANSFERS
      * THESE REPORTS WILL BE SCHEDULED FOR OVERNIGHT EXECUTION

- CHECK THE STATUS OF A PREVIOUSLY SCHEDULED PRINT REPORT
- CHECK THE STATUS OF A PREVIOUSLY SUBMITTED PRINT REPORT

PRESS PF1 TO RETURN TO THE SIS MAIN MENU
  
```

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3. The following screen will be displayed. Type "05" in the ENTER REPORT GROUP field and press [ENTER].

GHCS17IN                      HISTORICAL REPORTING SELECTION                      05/13/93                      15:20:42

REPORT GROUP	REPORT GROUP DESCRIPTION
05	SIS HISTORICAL REPORTING
10	LRS HISTORICAL REPORTING
15	VOLUME HISTORICAL REPORTING
20	VENDING HISTORICAL REPORTING
25	SMS REPORTS
30	FIELD SALES OPERATING FUND RPT
35	COUPON TRACKING

ENTER REPORT GROUP OR  
ENTER AN X FOR INDEX: 05

PRESS PF1 TO RETURN TO PRINT REPORT MENU

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## COORDINATING THE WORKPLAN

4. The following screen will be displayed. Type "806" in the ENTER REPORT NUMBER field and press [ENTER].

REPORT NUMBER	REPORT DESCRIPTION
120	TOP 25/BRAND OPPORTUNITY REPORT
121	PRELIMINARY PAY REGISTER DETAIL
122	PRELIMINARY PAY REGISTER TOTALS
123	WEEKLY FINAL PAY REGISTER DETAIL
125	QUARTERLY FINAL PAY REGISTER DETAIL
126	QUARTERLY FINAL PAY REGISTER TOTALS
127	SIS DIRECTORY OF CHAIN ACCOUNT
130	ELECTRONIC SECURITY DEDUCTION RPT.
132	ACCOUNTS PAID, NO CALL MADE REPORT
134	CPR 'NO-PAY' ACCOUNT LIABILITY RPT
135	DISTR. ASSIST PAYMENT SUMMARY RPT.
137	LIST OF ACCOUNTS WITH MISSING TAXID
141	MONTHLY RETAIL ACCOUNT COVERAGE RPT

ENTER REPORT NUMBER: **806**

PRESS ENTER TO SCROLL  
PRESS PF1 TO RETURN TO HISTORICAL REPORTING SELECTION

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**COORDINATING THE WORKPLAN****1**

5. The following screen will be displayed.

- Select report pertinent to appropriate time period.
- Type your print destination.
- Type desired sales level (Region/Division).
- Press [ENTER] to request report.

HISTORICAL REPORT DETAIL MENU			05/13/93	15:22:19
REPORT: QUARTERLY WORKPLAN PROMOTIONS				
NUMBER	DATE REPORT WAS PRODUCED		COMMENTS	
-----	-----		-----	
01.)	APRIL	27, 1993	3RD QUARTER 1993 REPORT	
02.)	MARCH	19, 1993	2ND QUARTER 1993 REPORT	
03.)	MARCH	17, 1993	1ST QUARTER 1993 REPORT	

SELECTION NUMBER:	01	PRINT DESTINATION:	6326
SALES LEVEL:	6326XX		

PRESS PF1 TO RETURN TO HISTORICAL REPORT MENU

Following is an example of the Workplan Report 806.

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## 6326 MINNEAPOLIS DIVISION

TYPE	PROGRAM	PROGRAM DESCRIPTION	COMMODITY	SKU'S APR	SKU'S MAY	SKU'S JUN	SKU'S TOTAL	PACKING
BSGSF	300741	WINSTON Q2 BUY CARTON GET 5 FREE PACKS		70			70	60
BSGSF	300777	CAM CU BAKED B1G1F W/POS-CAT/INFO CD		2,140			2,140	40
BSGSF	300829	SALEM 2Q B2G1F (CORE FAMILY)				90	90	40
BSGSF	300996	WINSTON Q2 B1G1F SELECT OFFER		500			500	40
BSGSF	302524	CAMEL B1G1F (INCREMENTAL)		1,860			1,860	40
	300415	CAM \$1.50/3 PKS CPM-30032 6/30/94 EXP.						
CPN		1.50/ CANCEL FEE	280975					100
POS		DUMP BIN R/C	280986					25
POS		PREM DISP R/C	280997					25
POS		24" PMC	281118					25
POS		CAM 24" PMC GENERIC	388247	12			12	25
	300750	WINSTON Q2 \$1.00 OFF 2-PACKS CPM(W/B)						
CPN		1.00/2PK CPM PREP CH	381185					100
POS		PREMIUM RISER CD	381372		10		10	25
POS		DUMP BIN RISER CD	381383					25
POS		24" PKG MERCH CD	381394		12		12	25
	300753	WINSTON Q2/Q3 \$ 3.00 OFF CARTON						
CPN		WIN 3.00/CTN CPM	381207	113			113	100
POS		WIN 2Q 3/CTN RISER	381306	12			12	25
POS		Q2 MILT SHELF STRP	381317	12			12	25
POS		WIN WIN Q3 3/CTN RIS	399181					25
POS		WIN Q3 MILT SHELF ST	399192					25
	300755	WIN Q2/Q3 \$7.00 OFF 2 CARTONS CPM						
CPN		WIN 7.00/CTN CPM	381229	20			20	100
POS		Q2 FLR BASE RSR CD	381240	6			6	25
POS		Q3 FLR BASE RSR CD	399269					25
	300819	SALEM 2Q & 3Q \$3 OFF CTN MULTI-BRAND CPM						
CPN		3/CTN	380184	86			86	100
POS		STATIC CLING	380173	4			4	50
POS		MILITARY SHELF STR	380162	4			4	100
POS		90 CTN FLOOR R/C	380151	4			4	25
	300825	SALEM 2Q \$1/2 PKS CPMMULTIBRAND						
CPN		1/ 2 PKS	404582					100
POS		GM DUMP BIN R/C	379997					25
POS		GM PREM PROMO R/C	379986					25
POS		GM 24" PMC	379975	5			5	25
POS		MIP SECURITY R/C	379964					25
POS		MIP LARGE PASTER	379953					50
POS		MIP DISPLAY RISER CD	379942	5			5	25
	300827	SALEM 2Q \$ .50/ 1 PK CPM MULTIBRAND						
CPN		.50/ 1 PK C	404516					500
POS		GM DUMP BIN R/C	379920					25
POS		GM PREM PROMO R/C	379909					25
POS		GM 24" PMC	379898	8			8	25
POS		MIP SECURITY R/C	379887					25
POS		MIP LARGE PASTER	379876					50
POS		MIP DISPLAY RISER CD	379865	8			8	25
	300850	VANTAGE \$1/2 PKS MULTIBRAND COUPON						
CPN		CPN PROD & SMS	404582					100
POS		24" MERCH CD & SMS	384749	18			18	25
POS		PREMIUM R/C & SMS	384760	6			6	25

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## SMS Report 570

1. With the SMS Main Menu displayed, type 570 in the FN field and press [ENTER].
2. The Workplan Communications Print screen will be displayed.

```

WKP570N1          WORKPLAN COMMUNICATIONS PRINT          05/13/93 - 15:24:24.
- SELECT PROGRAMS FROM LIST          _ PRINT ALL PROGRAMS
  TO BE PRINTED
                                START MONTH
                                - 01/93
                                - 02/93
                                - 03/93
                                - 04/93
                                - 05/93
                                - 06/93
                                - 07/93
                                - 08/93
                                - 09/93
                                - 10/93
                                - 11/93
                                - 12/93

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
PREV
  
```

3. You have three options from this screen:
  - **PRINT SPECIFIC PROMOTIONS:** To select any combination of programs from the list to be printed, type an "X" in front of the SELECT PROGRAMS prompt and press [ENTER]. At the next screen, type "X" in front of the programs you wish to print, type your report destination, the number of copies and press [ENTER].
  - **PRINT ALL PROMOTIONS:** If you wish details for all programs, type an "X" in front of the PRINT ALL PROGRAMS option and press [ENTER].
  - **PRINT ALL PROMOTIONS FOR SPECIFIC TIME FRAME:** To print programs by start dates, type an "X" in front of the start dates you are interested in and press [ENTER]. At the next screen, type your printer destination, number of copies, and press [ENTER]. Reports should print at the specified destination only.
4. Following is an example of the SMS 570 report. This information is also sent from Winston-Salem once each quarter.

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WFP51B2 07/06/93

R. J. REYNOLDS TOBACCO COMPANY  
PROMOTIONAL PROGRAMS LISTING FOR SALES LEVEL 6126XK

PROMOTION #

102012

DESCRIPTION: CAM SPEC LTS \$1.25/2 PK CPN W/5-SPOT CONTACT: JOHN ELEGATE-5760 DTG: 07/05/93

DTOPS:

VALUE ADDED SHIPPER:

UPC CODE: 12100-70373

HH START: 07/05/93 HH END: 12/31/93 PC START: 07/05/93 PC END: 01/30/94

HH CODES

DISPLAY PAYMENT

RATE

COUPON: C SP.LTS \$1.25/2

COMMENTS: CAMEL SPECIAL LIGHTS \$1.25 OFF 2 PACKS COUPON-TO BE USED ONLY ON

SPECIAL LIGHTS PRODUCT:

P73 FOR ITEM CODES-REMEMBER TO ORDER SUPPORTING POS!!!

P76 FOR HH CODE-

ALLOC AVAIL: DTS MONTH SMS SIS

7

8

9

10

11

12

SMS ITEM DESCRIPTION PACKED/SKU

399874 CAM 1.25/2PK S. LT 100/SKU

399865 PREM. DISP R/C 25/SKU

399896 DUMP BIN R/C 25/SKU

399907 24" PWC-RU SPECIFT 25/SKU

DIVISIONS LINKED TO PROGRAM

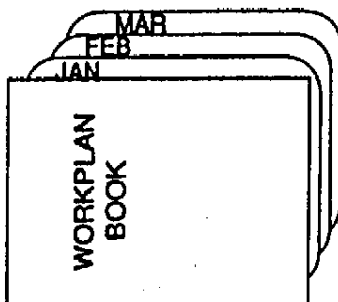
JUL	1130	1134	1140	1222	1226	1228	1232	1524	1526	1528	1530	1532	1534	1536	1538	1540	1542	1544	1546	1548	1550	1552	1554	1556	1558	1560	1562	1564	1566	1568	1570	1572	1574	1576	1578	1580	1582	1584	1586	1588	1590	1592	1594	1596	1598	1600	1602	1604	1606	1608	1610	1612	1614	1616	1618	1620	1622	1624	1626	1628	1630	1632	1634	1636	1638	1640	1642	1644	1646	1648	1650	1652	1654	1656	1658	1660	1662	1664	1666	1668	1670	1672	1674	1676	1678	1680	1682	1684	1686	1688	1690	1692	1694	1696	1698	1700	1702	1704	1706	1708	1710	1712	1714	1716	1718	1720	1722	1724	1726	1728	1730	1732	1734	1736	1738	1740	1742	1744	1746	1748	1750	1752	1754	1756	1758	1760	1762	1764	1766	1768	1770	1772	1774	1776	1778	1780	1782	1784	1786	1788	1790	1792	1794	1796	1798	1800	1802	1804	1806	1808	1810	1812	1814	1816	1818	1820	1822	1824	1826	1828	1830	1832	1834	1836	1838	1840	1842	1844	1846	1848	1850	1852	1854	1856	1858	1860	1862	1864	1866	1868	1870	1872	1874	1876	1878	1880	1882	1884	1886	1888	1890	1892	1894	1896	1898	1900	1902	1904	1906	1908	1910	1912	1914	1916	1918	1920	1922	1924	1926	1928	1930	1932	1934	1936	1938	1940	1942	1944	1946	1948	1950	1952	1954	1956	1958	1960	1962	1964	1966	1968	1970	1972	1974	1976	1978	1980	1982	1984	1986	1988	1990	1992	1994	1996	1998	2000																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																		
2128	2126	2124	2122	2120	2118	2116	2114	2112	2110	2108	2106	2104	2102	2100	2098	2096	2094	2092	2090	2088	2086	2084	2082	2080	2078	2076	2074	2072	2070	2068	2066	2064	2062	2060	2058	2056	2054	2052	2050	2048	2046	2044	2042	2040	2038	2036	2034	2032	2030	2028	2026	2024	2022	2020	2018	2016	2014	2012	2010	2008	2006	2004	2002	2000	1998	1996	1994	1992	1990	1988	1986	1984	1982	1980	1978	1976	1974	1972	1970	1968	1966	1964	1962	1960	1958	1956	1954	1952	1950	1948	1946	1944	1942	1940	1938	1936	1934	1932	1930	1928	1926	1924	1922	1920	1918	1916	1914	1912	1910	1908	1906	1904	1902	1900	1898	1896	1894	1892	1890	1888	1886	1884	1882	1880	1878	1876	1874	1872	1870	1868	1866	1864	1862	1860	1858	1856	1854	1852	1850	1848	1846	1844	1842	1840	1838	1836	1834	1832	1830	1828	1826	1824	1822	1820	1818	1816	1814	1812	1810	1808	1806	1804	1802	1800	1798	1796	1794	1792	1790	1788	1786	1784	1782	1780	1778	1776	1774	1772	1770	1768	1766	1764	1762	1760	1758	1756	1754	1752	1750	1748	1746	1744	1742	1740	1738	1736	1734	1732	1730	1728	1726	1724	1722	1720	1718	1716	1714	1712	1710	1708	1706	1704	1702	1700	1698	1696	1694	1692	1690	1688	1686	1684	1682	1680	1678	1676	1674	1672	1670	1668	1666	1664	1662	1660	1658	1656	1654	1652	1650	1648	1646	1644	1642	1640	1638	1636	1634	1632	1630	1628	1626	1624	1622	1620	1618	1616	1614	1612	1610	1608	1606	1604	1602	1600	1598	1596	1594	1592	1590	1588	1586	1584	1582	1580	1578	1576	1574	1572	1570	1568	1566	1564	1562	1560	1558	1556	1554	1552	1550	1548	1546	1544	1542	1540	1538	1536	1534	1532	1530	1528	1526	1524	1522	1520	1518	1516	1514	1512	1510	1508	1506	1504	1502	1500	1498	1496	1494	1492	1490	1488	1486	1484	1482	1480	1478	1476	1474	1472	1470	1468	1466	1464	1462	1460	1458	1456	1454	1452	1450	1448	1446	1444	1442	1440	1438	1436	1434	1432	1430	1428	1426	1424	1422	1420	1418	1416	1414	1412	1410	1408	1406	1404	1402	1400	1398	1396	1394	1392	1390	1388	1386	1384	1382	1380	1378	1376	1374	1372	1370	1368	1366	1364	1362	1360	1358	1356	1354	1352	1350	1348	1346	1344	1342	1340	1338	1336	1334	1332	1330	1328	1326	1324	1322	1320	1318	1316	1314	1312	1310	1308	1306	1304	1302	1300	1298	1296	1294	1292	1290	1288	1286	1284	1282	1280	1278	1276	1274	1272	1270	1268	1266	1264	1262	1260	1258	1256	1254	1252	1250	1248	1246	1244	1242	1240	1238	1236	1234	1232	1230	1228	1226	1224	1222	1220	1218	1216	1214	1212	1210	1208	1206	1204	1202	1200	1198	1196	1194	1192	1190	1188	1186	1184	1182	1180	1178	1176	1174	1172	1170	1168	1166	1164	1162	1160	1158	1156	1154	1152	1150	1148	1146	1144	1142	1140	1138	1136	1134	1132	1130	1128	1126	1124	1122	1120	1118	1116	1114	1112	1110	1108	1106	1104	1102	1100	1098	1096	1094	1092	1090	1088	1086	1084	1082	1080	1078	1076	1074	1072	1070	1068	1066	1064	1062	1060	1058	1056	1054	1052	1050	1048	1046	1044	1042	1040	1038	1036	1034	1032	1030	1028	1026	1024	1022	1020	1018	1016	1014	1012	1010	1008	1006	1004	1002	1000	9998	9996	9994	9992	9990	9988	9986	9984	9982	9980	9978	9976	9974	9972	9970	9968	9966	9964	9962	9960	9958	9956	9954	9952	9950	9948	9946	9944	9942	9940	9938	9936	9934	9932	9930	9928	9926	9924	9922	9920	9918	9916	9914	9912	9910	9908	9906	9904	9902	9900	9898	9896	9894	9892	9890	9888	9886	9884	9882	9880	9878	9876	9874	9872	9870	9868	9866	9864	9862	9860	9858	9856	9854	9852	9850	9848	9846	9844	9842	9840	9838	9836	9834	9832	9830	9828	9826	9824	9822	9820	9818	9816	9814	9812	9810	9808	9806	9804	9802	9800	9798	9796	9794	9792	9790	9788	9786	9784	9782	9780	9778	9776	9774	9772	9770	9768	9766	9764	9762	9760	9758	9756	9754	9752	9750	9748	9746	9744	9742	9740	9738	9736	9734	9732	9730	9728	9726	9724	9722	9720	9718	9716	9714	9712	9710	9708	9706	9704	9702	9700	9698	9696	9694	9692	9690	9688	9686	9684	9682	9680	9678	9676	9674	9672	9670	9668	9666	9664	9662	9660	9658	9656	9654	9652	9650	9648	9646	9644	9642	9640	9638	9636	9634	9632	9630	9628	9626	9624	9622	9620	9618	9616	9614	9612	9610	9608	9606	9604	9602	9600	9598	9596	9594	9592	9590	9588	9586	9584	9582	9580	9578	9576	9574	9572	9570	9568	9566	9564	9562	9560	9558	9556	9554	9552	9550	9548	9546	9544	9542	9540	9538	9536	9534	9532	9530	9528	9526	9524	9522	9520	9518	9516	9514	9512	9510	9508	9506	9504	9502	9500	9498	9496	9494	9492	9490	9488	9486	9484	9482	9480	9478	9476	9474	9472	9470	9468	9466	9464	9462	9460	9458	9456	9454	9452	9450	9448	9446	9444	9442	9440	9438	9436	9434	9432	9430	9428	9426	9424	9422	9420	9418	9

## COORDINATING THE WORKPLAN

### Developing the Workplan Book

II. Develop initial format for Workplan Book. The Workplan Book is a tool utilized by sales reps and management which organizes and communicates promotional activities relating to the Workplan. One of the following formats should be utilized:

- Tab book by brand families
- Tab book by month/quarter program will be worked
- Combination of above



Once the "skeleton" of the Workplan Book has been set up, information regarding each promotion the Division will work should be placed behind the proper tab.

Data relative to each promotion should take up no more than the front and back of one piece of paper. By organizing this way, a sales representative will have a concise source of all information relating to promotions he/she will be working. The recommended format for each promotion page follows.

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## COORDINATING THE WORKPLAN

## Promotion Sheet

- FRONT
  - Picture of promotional item - obtain from the Region Operations Manager's National Workplan Book
  - Info detail from the 570 report

Promotion #: 301040

# Winston



WTS9081                      R.J. REYNOLDS TOBACCO CO.                      11/11/92  
PROMOTIONAL WORKPLAN BOOK FOR 2ND QTR 93

\*\*\*\*\*  
\* PROGRAM: 301040 MM/C STUNGIS T-SHIRT \*                      BRAND: CAMEL FAMILY TYPE: OPPORTUNISTIC  
\*\*\*\*\*

ITEM DESCRIPTION: CAMEL STUNGIS T-SHIRT PROGRAM. BUY 5 GET FREE STUNGIS  
T-SHIRT FOR PACKED M/PREMIUM SKU  
DIVE: NM5A

ITEM NO: 302026 STUNGIS T-SHIRT M/POB

PROMOTION DYNAMICS:  
OBJECTIVE: TRIAL/CONVERSION

TARGET: MALE/FEMALE SMOKERS 21+

RECOMMENDED TIME TO WORK: JUNE

COSTS: SKU 120.00    COST/PROMO.CTN 6 12.00  
PV:    SKU 3000

CONTINUITY INFORMATION:

PROGRAM CONTACT: HOLLY WOOD

SKU QUANTITY: 20/SKU

POB AVAILABLE:                      ITEM #:

All Winston-Salem information can be found on this page, as well as a picture of the promotional item, if available.

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## COORDINATING THE WORKPLAN

- BACK
  - Allocation template noting rep allotments, ship to locations, etc.

Promotion: _____		DIVISION 6324							
Division Utilization Period: _____									
Term	Shipping Point								
1	Division Office								
	J.P. Fritz								
2	Division Office								
	Pioneer								
3	Division Office								
	J.P. Fritz								
4	Division Office								
	Segafa								
5	Storage								
	Hermel								
6	Storage								
	Hermel								
7	Storage								
	Fox								
8	Storage								
	Reynolds								
9	Storage								
	J.P. Fritz								
10	Storage								
	TruMart								
11	Storage								
	Tony's								
12	Storage								
	TruMart								
13	Storage								
	Hub City								
14	Storage								
	TruMart								
Bepentcheld									
Schulte									
Wilson									
J.P. Fritz - VAP									
Gateway BP - VAP									
Hub City - VAP									
Office									
TOTAL									
NOTES: _____									

This template will be completed by inserting allocations, program title, dates and any pertinent notes later.

This information is driven by the local Operations Unit and informs Sales personnel of the quantities of each item they have for their use.

Prior to allocating promotions, the PRC should set up a master packet of these promotion sheets for all promotions being worked in the Region.

In many cases, since SMS allocations are available 1 - 2 months prior to a

## COORDINATING THE WORKPLAN

given quarter, the sheets can be produced and the following steps taken well before the start of the Workplan period.

- III. After receiving the initial allocations from SMS the Region Operations Manager, with DM/RM assistance if needed, will determine the timing of each promotion. After this is done, the PRC must ensure any required transfers of materials takes place.

### Transfers

1. If other Regions/Divisions have requested transfers, satisfy those requests.
  - If the Region has little or no allocation of the requested item, the PRC should communicate appropriately to the requesting Division and inform the Region Operations Manager.
  - To transfer premiums/coupons/VPRs to another Region/Division, see Materials Coordinator, Book III, Chapter 1.
  - To transfer product, see Promotion Coordinator, Chapter 3.
2. Communicate any transfer required from other operating units to those units. See Promotion Coordinator, Chapter 2.

Once all transfers, both incoming and outgoing, are complete, the final allocation needs to be determined.

- IV. After needed transfers have been made, the remaining product must first be allocated to appropriate VAP/DAP Direct Accounts. See Promotion Coordinator, Chapter 2.
- V. Once VAP/DAP programs have been allotted, the remaining product is available for allocation and placement by Sales Reps. This reallocation should be based on factors relative to the opportunity in each territory for the given promotion. While Division management can provide a quick, general set of percentages to assist in breaking out allocations to reps, information is available in SIS which should allow the PRC to accurately allocate promotions.
- Utilize National Marketing Indicator report to determine promotional needs for each territory in each Division.

### Obtaining National Marketing Indicator Report (NMI)

1. With the SIS Main Menu displayed, type an "X" beside Master List and press [ENTER].
2. The SIS Master List Main Menu will be displayed. Enter "M01" in the FN field and press [ENTER].
3. The following screen will be displayed. Press [ENTER].

### Allocating Promotions

### Obtaining NMI Report

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## COORDINATING THE WORKPLAN

```

SISM01S1 - M01      MASTER LIST Account Selection Menu      05/13/93 15:26:07

ENTER a Value for each option you wish to select by.
Account Number      _____ Sales Level      6326XX
Account Name        _____ Chain-ID
Proposed Territory   _____ Zip Code
Acct Type (R,D,I)    _____ Segment<?> (XX-ALL) Account Group
State                _____ County Code<?> Tax Jurisdiction
Wholesaler Number    _____ Type (P=Primary S=Secondary V-VAP)

-----
Function Menu
-----
- M10 SELECT by Contract      - M80 SELECT by Local Ind/Acct Mkt
- M11 SELECT by Accounts Contacted - M82 SELECT by Competitive Set
- M12 SELECT by Merchandiser
- M13 SELECT by Brand Distribution
- M14 SELECT by Call Classification
- M16 SELECT by Account Marketing
- M17 SELECT by Volume

-----
PF1 - SIS MAIN MENU
Current Selection Count: 0      Next Function<?>: _____

```

From this screen, instruct the system to select appropriate Divisions:

- Type sales level desired at SALES LEVEL prompt
- Press [ENTER].

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## COORDINATING THE WORKPLAN

4. The Account Scroll List will be displayed. Enter "M70" in the NEXT FUNCTION field and press [ENTER].

Displayed: 15 of 2017 Account Scroll - M03 05/13/93 15:27:17

Terr	Rte	Acct	CC	Name	Address	City
632605	000	581454	C13	VALLEY LIQUOR	1102 SHAKOPEE TOWN	SHAKOPEE
632605	359	568829	DS2	CHANHASSEN VIDEO	530 W 79TH STREET	CHANHASSEN
632601	000	023539	C06	COLONY LIQUOR STORE	15705 35TH AVENUE N	PLYMOUTH
632601	000	236187	C13	CLARK OIL #1132	7300 BROOKLYN BLVD	BROOKLYN PARK
632601	000	455454	E06	DRUG EMPORIUM #905	4190 VINEWOOD LN. N	PLYMOUTH
632601	000	460032	A04	O RYAN'S CONOCO	11201 93RD AVE. N.	MAPLE GROVE
632601	000	468298	C06	MGM LIQUOR #035	3900 VINEWOOD LANE	PLYMOUTH
632601	000	475956	A04	BILL'S SUPERETTE HDQ	6272 BOONE AVE. NO.	BROOKLYN PARK
632601	000	497220	K04	SUPERAMERICA #4461	9300 ZANE AVE. N.	BROOKLYN PARK
632601	000	548480	E06	KELLY'S LIQUOR	3210 BROOKDALE DR.	BROOKLYN PARK
632601	000	565211	B04	CONOCO #23045	12650 COUNTY RD 10	PLYMOUTH
632601	000	574533	C13	VILLAGE STORE	239 MEDINA ST. N.	LORETTO
632601	000	868022	A04	O SUPERETTES MIDWEST	2165 COMMERCE BLVD.	MOUND
632601	005	236939	K04	CHAMPLIN FOODS	10 CURTIS ROAD	CHAMPLIN
632601	010	872461	B04	EXPRESS LANE GROCERY	508 HIGHWAY 52	CHAMPLIN

NOTE: 'X' Accts to View Detail, 'A' in Top Acct to view all Selected Accts  
 PF1 - Account Selection Menu PF2 - Begin of Acct Group  
 Next Function<?>: **M70**

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**COORDINATING THE WORKPLAN**

5. The PRINT REPORT REQUEST screen will be displayed. Enter an "X" beside NATIONAL MKTG INDICATOR WORKSHEET and press [ENTER].

SISM70N1 - M70                      PRINT REPORT REQUEST                      05/13/93 03:28 PM  
CURRENT COUNT: 2017

REPORT FORMAT SELECTION:

- ACCOUNT COVERAGE REPORT	- TEMPORARY DISPLAY DETAIL REPORT
- CONTRACT LOOKUP BY ROWS	- TEMPORARY DISPLAY SUMMARIES
- REPORT FORMATTING	- MASTER LIST TOP 25 ACCOUNT LISTING
- LOCAL MARKETING INDICATOR WORKSHEET	- BRAND PRIORITY RANKING WORKSHEET
<input checked="" type="checkbox"/> NATIONAL MKTG INDICATOR WORKSHEET	- MERCH/ACCT MKT SUMMARIES
- CONTRACT SUMMARIES	- RETAIN MASTER LIST SELECTION
- SCROLL MASTER LIST WORKSHEET	- STANDARD MASTER LIST
- VAP ACCOUNT SCROLL LIST DETAIL	- SCROLL MASTER LIST
- SCROLL MASTER LIST - SUPPLEMENTAL	- ACTIVITY SUMMARY
- VAP ACCOUNT SCROLL LIST SUMMARY	- ACCOUNT RECAP
- BRAND DISTRIBUTION REPORT	- BRAND INVENTORY REPORT
- ACCOUNT LABELS	- ACCOUNT SPECIFIC PROFILE

PF1 - ACCOUNT SELECTION MENU                      NEXT FUNCTION<?>: \_\_\_\_\_

## COORDINATING THE WORKPLAN

6. The following window will be displayed. Enter the report destination and select whether you wish to view summary or detail information. Press [ENTER].

PRINT REPORT REQUEST

05/13/93 03:28 PM  
CURRENT COUNT: 2017

REPORT FORMAT SELECTION:

- ACCOUNT COVERAGE REPORT	- TEMPORARY DISPLAY DETAIL REPORT
- CONTRACT LOOKUP BY ROWS	- TEMPORARY DISPLAY SUMMARIES
- REPORT FORMATTING	- MASTER LIST TOP 25 ACCOUNT LISTING
- LOCAL MARKETING INDICATOR WORKSHEET	- BRAND PRIORITY RANKING WORKSHEET
- NATIONAL MKTG INDICATOR WORKSHEET	- MERCH/ACCT MKT SUMMARIES

REPORT SELECTION

REPORT TITLE: \_\_\_\_\_

REPORT DESTINATION: \_\_\_\_\_

DETAIL: \_\_\_\_\_

SUMMARY: \_\_\_\_\_

COPIES: 1

PF1 - ACCOUNT SELECTION MENU

NEXT FUNCTION<?>: \_\_\_\_\_

## Selecting "Summary"

- If at Division level, will total NMI data by territory for each promotional type
- If at the Region level, will total indicators for each promotion type, by Division. These summary reports provide the data needed.

## Selecting "Detail":

- If at Division level, will generate a list of each account and the indicators for each promotion type.
- If at Region level, will generate a list of each account in the Region and the indicators for each promo type.

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## COORDINATING THE WORKPLAN

7. Another window will be displayed where selections are made by Division, Region, Area, or national. Note instructions on previous page.

```

SIM70N1 - M70          PRINT REPORT REQUEST          05/13/93 03:28 PM
                  CURRENT COUNT: 2017

REPORT FORMAT SELECTION:
- ACCOUNT COVERAGE REPORT      - TEMPORARY DISPLAY DETAIL REPORT
- CONTRACT LOOKUP BY ROWS      - TEMPORARY DISPLAY SUMMARIES
- REPORT FORMATTING            - MASTER LIST TOP 25 ACCOUNT LISTING
- LOCAL MARKETING INDICATOR WORKSHEET - BRAND PRIORITY RANKING WORKSHEET
- NATIONAL MKTG INDICATOR WORKSHEET - MERCH/ACCT MKT SUMMARIES
- CONTRACT SUMMARIES          - RETAIN MASTER LIST SELECTION
- SCROLL
- VAP ACC
- SCROLL
- VAP ACC
- BRAND D
- ACCOUNT

REPORT TITLE: _____
REPORT DESTINATION: _____ COPIES: 1
DETAIL: _____
SUMMARY: _____

PF1 - ACCOUNT SELECTION MENU

BY DIVISION  SELECT
REGION      X
AREA
NATIONAL
  
```

Following is an example of the National Marketing Indicator Report. The example shown does not represent the entire report. Several additional pages will print indicating NMI data for other full-price brands and promotion types.



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632601 632601 TERRITORY	37	2450	3050	4450	250	500	1420
632602 632602 TERRITORY	29	1620	2500	2440	100	680	840
632603 632603 TERRITORY	8	1800	1520	1140	660	140	480
632604 632604 TERRITORY	15	1680	1780	1840	520	480	540
632605 632605 TERRITORY	16	2780	2300	2180	300	300	1210
632606 632606 TERRITORY	16	2060	2300	1960	390	820	1570
632607 632607 TERRITORY	44	1340	1120	1560	300	540	880
632608 632608 TERRITORY	40	2420	600	2020	120	560	1100
632609 632609 TERRITORY	7	1460	1380	1400	300	60	380
632610 632610 TERRITORY	2	2442	2300	1640	1000	220	440
632611 632611 TERRITORY	1	220	160	20	140		
*** TOTALS ***	199	20382	19120	20460	3790	4300	8860
** STORES WITH **	199	700	668	643	148	98	213
STORES IN SELECTION	1980						

Territory

OVERDEP

SAVINGS

BANK

WIN

WIN

WIN

WIN

WIN

NATIONAL MARKETING INDICATORS IN MASTER LIST

Sales Level: 632600

Report title:

81864985

Page:

07/06/93

## COORDINATING THE WORKPLAN

Using information taken directly from the NMI Report, the PRC can establish "weights" for each rep and promotion type. For example:

	NMI TOTAL	WEIGHTING %
	Win pkg Coup	
REP 1	1000	25%
REP 2	1000	25%
REP 3	2000	50%
	<u>4000</u>	<u>100%</u>

In this example, Rep 1 should receive 25% of any allocation for this promotional type. While this information can be derived manually, this logic can be formatted into an Excel spreadsheet similar to the one below. This spreadsheet will determine weighting percentages (based on raw data formed on NMI Report) and apply them to available allocations.

PROMOTIONAL ALLOCATION WORKSHEET WINSTON											
Enter Item:	67	150	350	17	60	287					
Territory	BxGrF	Allocated	Pkg Prem	Allocated	Pkg Coup	Allocated	Pkg VPR	Allocated	Ctn Prem	Allocated	Ctn Coup
1	2360	8	1000	7	925	18	400	3	1300	13	3130
2	2700	7	1280	8	800	12	420	3	280	3	1180
3	1560	4	1070	8	470	9	80	1	100	1	720
4	2880	7	1840	13	1140	23	140	1	240	2	880
5	2600	6	1420	10	2160	43	0	0	520	5	1120
6	3180	8	1620	12	1560	31	0	0	800	8	920
7	3840	9	2200	18	1980	39	200	1	600	6	900
8	1580	4	1780	13	1740	35	0	0	240	2	580
9	0	0	960	7	0	0	0	0	0	0	20
10	940	2	1700	12	1960	39	0	0	420	4	1060
11	3650	9	2200	16	1980	39	1040	8	800	8	2470
12	1360	3	780	8	780	15	0	0	140	1	700
13	640	2	1140	8	840	17	40	0	540	5	1300
14				0		0		0		0	
15	0	0		0		0		0		0	
RSO#1			680	5	510	10		0		0	
RSO#2			680	5	510	10		0		0	
RSO #3			680	5	510	10		0		0	
TOTAL	27300	67	20950	150	17845	350	2320	12	5060	60	14740

1 These cells represent division allocations, after VAP, for a given item. To determine an item's rep breakout, simply input amount needing to be allocated above the appropriate promotion type (i.e., Winston BxGrF, Winston Pkg Prem, etc.)

2 These are total quantities, by promotion type and sales rep, requested based on NMI data. These quantities are taken directly from the National Marketing Indicator report and are used to derive weighting percentages for each promo type and sales rep.

3 The percentages derived above are applied against the allocations available (1) and an allocated quantity unique and weighted to that rep and promo type is generated.

- After inputting allocation data to spreadsheet, doublecheck breakouts and adjust where necessary. The accuracy of sales rep indicator data will drive the need to adjust. NMI data must be consistently entered.
- Fill in each promotion sheet previously developed by writing allocations into appropriate columns. Add comments as necessary.

## COORDINATING THE WORKPLAN

Promotion: CAMEL BRASS LIGHTER		Division Utilization Period: JUNE 28 - JULY 30								DMSION 8224	
Term #	Shipping Point	LIGHTER # 381386									
1	Division Office										
	J.P. Ritz										
2	Division Office										
	Pioneer										
3	Division Office										
	J.P. Ritz										
4	Division Office										
	Segelf										
5	Storage										
	Hettel										
6	Storage										
	Hettel										
7	Storage										
	For										
8	Storage										
	Reynolds										
9	Storage										
	J.P. Ritz										
10	Storage										
	Trident										
11	Storage										
	Tony's										
12	Storage										
	Trident										
13	Storage										
	Hub City										
14	Storage										
	Trident										
Regenscheld											
Schule											
Wilson											
J.P. Ritz - YAP											
Gateway BP - YAP											
Hub City - YAP											
Office											
TOTAL											
NOTES: _____											

VI. Place completed program forms into Workplan book. Three other sections should be included in each book:

- Full Price Workplan Guidelines
- Region Savings Brand Guidelines
- Quarterly calendar, if needed
- Miscellaneous Correspondence

Once all quarterly information for each Division has been placed in each Division's master book, copies should be made for sales reps. After initial setup, contents will be updated quarterly and sent to reps for placement in their Workplan Book.

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Chapter 2  
Coordinating Valve Added

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**COORDINATING VALUE-ADDED PROGRAMS**

---

**Preliminary Activities**

- ◆ Ensure SIS information is as accurate as possible (i.e., primary/VAP wholesaler account number, VAP supplier number, PP indicators, etc.)
- ◆ Develop and maintain direct account "contact sheet." This document should contain information such as SIS numbers, addresses, names of key contacts, special instructions, phone numbers, EFT numbers etc., for all VAP directs in Region.
- ◆ Develop Region guidelines for timing of VAP shipments, transfer completion dates, etc.
- ◆ Allocation for value-added promotions must occur before breaking out promotion to sales reps.

Remember the Workplan Flow Formula:

**ORIGINAL ALLOCATIONS**

- TRANSFERS TO  
+ TRANSFERS FROM

---

**NET ALLOCATION FOR REGION**

- VAP NEEDS  
- DAP NEEDS

---

**SALES REP ALLOCATION**

The following procedures indicate how to ensure this formula is followed accurately and completely.

---

**Procedures**

- I. Management will select promotion and display loads for VAP. Direct chain VAP promotions are selected by CAM responsible for chain. Region Operations Manager selects promotions and displays loads for all other VAP accounts.
- II. Review Division workplan information relative to the promotion chosen for VAP. Refer to reports 806 and 570. Information includes timetables, commodity #s, Handheld reporting and quantities.
- III. Extract VAP scroll detail. This report needs to be pulled for every promotion being shipped via VAP because of ongoing changes. Two versions of this report are needed:
  - A VAP scroll list for all VAP direct accounts which lists all retail accounts serviced by the direct account and
  - A VAP scroll list for each VAP account by state. These lists are needed to communicate tax-stamping requirements to applicable wholesalers.

## COORDINATING VALUE-ADDED PROGRAMS

VAP Scroll List  
Details

1. With the SIS Main Menu displayed, place an "X" beside Master List and press [ENTER]. Enter M01 in the FN field and press [ENTER]. The following screen will be displayed.

```

SISMD1S1 - M01      MASTER LIST Account Selection Menu      06/09/93  10:19:48

ENTER a Value for each option you wish to select by.
Account Number      _____ Sales Level      (XXXXX)
Account Name        _____ Chain-ID        _____
Proposed Territory  _____ Zip Code        _____
Acct Type (R,D,S)   _____ Account Group    _____
State               _____ Tax Jurisdiction  _____
County Code(?)      _____
Wholesaler Number   (128810) Type (P-PRIMARY S-Secondary V-VAP)

-----
Function Menu
-----
M10 SELECT by Contract      M80 SELECT by Local Ind/Acct Mkt
M11 SELECT by Accounts Contacted  M82 SELECT by Competitive Set
M12 SELECT by Merchandiser
M13 SELECT by Brand Distribution
M14 SELECT by Call Classification
M15 SELECT by Account Marketing
M17 SELECT by Volume

PF1 - SIS MAIN MENU
Current Selection Count: 0

Next Function(?)>: _____
  
```

2. Enter the WHOLESALER NUMBER, the TYPE, the SALES LEVEL (this must be all x's) and press [ENTER]. The following screen will be displayed.

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## COORDINATING VALUE-ADDED PROGRAMS

Displayed: 15 of 2017 Account Scroll - M03 05/13/93 15:32:47

Terr	Rte	Acct	CC	Name	Address	City
A	632605	000	581454	C13 VALLEY LIQUOR	1102 SHAROPPE TOWN	SHAROPPE
-	632605	359	569829	D52 CHANNASSEN VIDEO	530 W 79TH STREET	CHANNASSEN
-	632601	000	023539	C06 COLONY LIQUOR STORE	15705 35TH AVENUE W	PLYMOUTH
-	632601	000	236187	C13 CLARK OIL #1132	7300 BROOKLYN BLVD	BROOKLYN PARK
-	632601	000	435454	E06 DRUG EMPORIUM #905	4190 VINEWOOD LN. W	PLYMOUTH
-	632601	000	460032	A04 O RYAN'S CONOCO	11201 93RD AVE. N.	MAPLE GROVE
-	632603	000	468298	C06 MCM LIQUOR #035	3900 VINEWOOD LANE	PLYMOUTH
-	632601	000	475916	A04 BILL'S SUPERETTE HDQ	6272 BOONE AVE. NO.	BROOKLYN PARK
-	632601	000	497220	R04 SUPERAMERICA #4461	9300 LANE AVE. N.	BROOKLYN PARK
-	632601	000	548480	E06 KELLY'S LIQUOR	3210 BROOKDALE DR.	BROOKLYN PARK
-	632601	000	565211	B04 CONOCO #23045	12650 COUNTY RD 10	PLYMOUTH
-	632601	000	574533	C13 VILLAGE STORE	239 MEDINA ST. N.	LORETTO
-	632601	000	868022	A04 O SUPERETTES MIDWEST	2365 COMMERCE BLVD.	MOUND
-	632601	005	236939	K04 CHAMPLIN FOODS	10 CURTIS ROAD	CHAMPLIN
-	632601	010	872461	B04 EXPRESS LANE GROCERY	508 HIGHWAY 52	CHAMPLIN

NOTE: 'X' Accts to View Detail, 'A' in Top Acct to view all Selected Accts  
 PF1 - Account Selection Menu PF2 - Begin of Acct Group  
 Next Function<?>: M70

3. Enter an "A" to view all selected accounts and enter M70 in the NEXT FUNCTION field. Press [ENTER]. The following screen will be displayed.

SISK70M1 - M70 PRINT REPORT REQUEST 05/13/93 03:33 PM  
 CURRENT COUNT: 2017

REPORT FORMAT SELECTION:

- ACCOUNT COVERAGE REPORT	- TEMPORARY DISPLAY DETAIL REPORT
- CONTRACT LOOKUP BY ROWS	- TEMPORARY DISPLAY SUMMARIES
- REPORT FORMATTING	- MASTER LIST TOP 25 ACCOUNT LISTING
- LOCAL MARKETING INDICATOR WORKSHEET	- BRAND PRIORITY RANKING WORKSHEET
- NATIONAL MKTG INDICATOR WORKSHEET	- MERCH/ACCT MKT SUMMARIES
- CONTRACT SUMMARIES	- RETAIN MASTER LIST SELECTION
- SCROLL MASTER LIST WORKSHEET	- STANDARD MASTER LIST
X VAP ACCOUNT SCROLL LIST DETAIL	- SCROLL MASTER LIST
- SCROLL MASTER LIST - SUPPLEMENTAL	- ACTIVITY SUMMARY
- VAP ACCOUNT SCROLL LIST SUMMARY	- ACCOUNT RECAP
- BRAND DISTRIBUTION REPORT	- BRAND INVENTORY REPORT
- ACCOUNT LABELS	- ACCOUNT SPECIFIC PROFILE

PF1 - ACCOUNT SELECTION MENU NEXT FUNCTION<?>: \_\_\_\_\_

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## COORDINATING VALUE-ADDED PROGRAMS

4. Enter an "X" beside VAP ACCOUNT SCROLL LIST DETAIL and press [ENTER]. The following window will be displayed, where you may enter the report name, your destination and copies required.

SISM70M1 - M70      PRINT REPORT REQUEST      05/15/93 03:33 PM  
CURRENT COUNT: 2017

REPORT FORMAT SELECTION:

- ACCOUNT COVERAGE REPORT	- TEMPORARY DISPLAY DETAIL REPORT
- CONTRACT LOOKUP BY ROWS	- TEMPORARY DISPLAY SUMMARIES
- REPORT FORMATTING	- MASTER LIST TOP 25 ACCOUNT LISTING
- LOCAL MARKETING INDICATOR WORKSHEET	- BRAND PRIORITY RANKING WORKSHEET
- NATIONAL MKTG INDICATOR WORKSHEET	- MERCH/ACCT MKT SUMMARIES
- CONTRACT SUMMARIES	- RETAIN MASTER LIST SELECTION
- SCROLL MASTER LIST WORKSHEET	- STANDARD MASTER LIST
- VAP ACCOUNT SCROLL LIST DETAIL	- SCROLL MASTER LIST
- SCROLL MASTER LIST - SUPPLEMENTAL	- ACTIVITY SUMMARY
X VAP ACCOUNT SCROLL LIST SUMMARY	- ACCOUNT RECAP
- BRAND DISTRIBUTION REPORT	- BRAND INVENTORY REPORT
- ACCOUNT LABELS	- ACCOUNT SPECIFIC PROFILE

REPORT DESTINATION (6326)      COPIES (01)

REPORT TITLE  
VAP ACCOUNT SCROLL LIST SUMMARY

PF1 - ACCOUNT SELECTION MENU      NEXT FUNCTION(<?>):

Following is an example of a Value-Added Scroll List Detail report.

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## COORDINATING VALUE-ADDED PROGRAMS

GHC726BN			VAP ACCOUNT SCROLL LIST DETAIL REPORT											
			WATSON 6328											
			WATSON COMPANY, INC 325249											
SUPPLIER	ACCOUNT	YEAR	NAME	ADDRESS	CITY	ST	PP#1	PP#2	PP#3	EXTRA PP SKUs	VAP TOTAL	VAP OVR	VAP ALLOC	DIV ALLOC
327230	451739	632607	COUNTRY LINE LIQUOR	6629 N LAKE BLVD	FOREST LAKE	MN	0	0	0	0	0	0	0	0
416550	542366	632607	NORTHBOND LIQUOR	50 MAIN STREET	ELK RIVER	MN	1	0	0	0	1	0	1	0
	946161	632607	CENEX CONVENIENCE	13274 WEST HWY 10	ELK RIVER	MN	1	0	0	0	1	0	1	0
	930325	632607	PRINCETON TOWN MKT	211 N LA GRANDE	PRINCETON	MN	0	1	0	0	2	0	2	0
	498227	632607	SOME COUNTRY EXPRESS	JCT 159 & 95 BOX 214	PRINCETON	MN	1	0	0	0	1	0	1	0
	074150	632607	MURRAY'S CORNER STORE	34670 BELLUM ST NW	PRINCETON	MN	0	1	0	0	3	0	3	0
577576	257473	632607	SHORT STOP SUPERETTE	PPT3	GRAND RAPIDS	MN	1	0	0	0	1	0	1	0
367231	437285	632607	COLONIAL LIQUOR	25 N LAKE ST	FOREST LAKE	MN	1	0	0	0	1	0	1	0
72900	560149	632607	MARLEN'S PLACE	155 1ST STREET SW	HILLBURN	MN	1	0	0	0	1	0	1	0
TOTAL ACCOUNTS -							9	6	2	0	0	10	10	0
TOTAL ACCOUNTS -							9	6	2	0	0	10	10	0

To access the VAP Detail per state, follow previous instructions and indicate state desired when at the Main Master List screen.

#### Description of VAP Scroll List Detail Report data:

Supplier - Account number assigned to the retailer by the Direct Account, not by RJR

Account - RJR account number

Terr - Division and territory number in which the account resides

Name, Address, City, State - Information specific to the account

PP indicators - 1 or 0 will appear in one of these options

PP#1 - Indicates the accounts should receive one display of a given promotion - can be input by reps via handheld or on an office PC

PP#2 - Indicates the accounts should receive two displays

PP#3 - Indicates the accounts should receive three displays

Extra SKUs - If extra SKUs (in addition to PP# total) are needed, they appear here

PP Total - Total number of displays to be shipped to an account

The Total Accounts line indicates the sum of all retail accounts in the report in each column.

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**COORDINATING VALUE-ADDED PROGRAMS**

IV. Utilize these reports to determine the quantity of promotional SKUs needed to satisfy VAP requirements for each VAP direct account. These totals are required:

- To determine Direct Account needs. Utilize VAP scroll detail and check VAP total column on final page of report. This will indicate the number of displays needed for the program.
- To determine tax stamping requirements for each state, P.P. indicators need to be totaled by state for each VAP Direct Account. This information should be utilized when ordering product for tax stamping purposes at the direct account, etc. See *Ordering BSGSF* for information on utilizing this report.
- To determine transfer needs, use the following instructions.

See the following pages for Value-Added Transfer procedures.

**Value-Added  
Transfer**

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Please review the following set of procedures before using the Premiums, Coupons, VPRs transfer function.

### I. VAP TRANSFER - PREMIUMS, COUPONS, VPRs.

- Step 1: Select "Master List" from SIS menu.  
Step 2: Enter function "M40" - VAP function.  
Step 3: Enter "M42" - VAP Transfer (Premium, VPR, CPN).  
Step 4: Enter "VAP Wholesaler Number" for the direct account assembling/delivering the promotion.  
(The VAP Wholesaler Number entered must be a valid direct account in your geographic location.)  
Step 5: Enter "Promotion Year" of allocations you are transferring.

WKPM42N1	17 OF 517	WORKPLAN MATERIALS ORDERING
NEXT PROGRAM 300286		
PROGRAM	TYPE	START DATE
303481	PREMIUM	07/05/93
303443	PREMIUM	07/05/93
303253	PREMIUM	07/05/93
303253	PREMIUM	07/05/93
303253	PREMIUM	07/05/93
303203	PREMIUM	07/05/93
PROGRAM TITLE		
CAM. B2GF 14-OZ. TUMBLER HLDVR (AGED)		
MWSA M/B-B2G \$1/GAS (MICHIGAN SHELL)		
SALEM B2GF POOLBALL BOTTLE OPENER		
SALEM B2GF POOLBALL BOTTLE OPENER		
SALEM B2GF POOLBALL BOTTLE OPENER		
CAMEL PM B3GF TKT. TO GT RACE/PORT.		

- Step 6:  
Enter "Program Number" in the "Next Program" in upper right of the screen to jump directly to that program or scroll to the selected program by pressing enter. When the program number appears select with an "X" and press enter.

WKPM42N1	517 OF 517	WORKPLAN MATERIALS ORDERING
ITEM SELECTION		
MARK YOUR SELECTION(S) WITH X		
x 282702	SALEM CORD CAP W/POS	409235 HAT 1.65
409246	PKG .321	
PRESS ENTER TO CONTINUE		

- Step 7:  
Select the item you are transferring SKUs for with an "X" and press enter.

WKPM42N2 - M42	VALUE ADDED QUANTITY TRANSFER
PROGRAM: 300286 SALEM 1QTR B2GF CORDUROY HAT	
ITEM: 282702 SALEM CORD CAP W/ POS	
PACKING: 20/SKU	
DRIVE PERIOD	
x JAN 93	FEB 93
MAR 93	

- Step 8:  
Select the drive period you are transferring allocations for with an "X" and press enter.  
**NOTE:** You may only transfer once per drive period/per item/per account.

WKPM42N2 - M42	VALUE ADDED QUANTITY TRANSFER
PROGRAM: 300286 SALEM 1QTR B2GF CORDUROY HAT	
ITEM: 282702 SALEM CORD CAP W/ POS	
PACKING: 20/SKU	
IND. TYPE SELECTION	
PROMOTIONAL: x	
VAP: _	

- Step 9:  
- If a premium program has been selected, you may select "National Promotional Indicators" or "VAP Indicators" to determine quantities.  
- If a coupon or VPR program has been selected you may only select "National Promotional Indicators."  
**Note:** Indicator quantities must be used in order to utilize this function.

**Definitions:** National Promotional Indicators: Indicators by brand and vehicle in salable units for a two-week time period entered by Sales Reps.  
VAP Indicators: Indicators in SKUs which can be used for premium and BSGSF programs only (PP Pack #1, PP Pack #2, PP Pack #3, PP Ctn, PP Extra SKU, VAP Over-ride Qty.). On October 4, the VAP Indicators will no longer be available.

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scm: 7/19/93

# I. VAP TRANSFER - PREMIUMS, COUPONS, VPRS. (CONTINUED)

WKPM42N5 - M42

VALUE ADDED QUANTITY TRANSFER

CAMEL:

☐ CAM BXGXF    ☐ CAM PKG PREMIUM    ☐ CAM PKG COUPON    ☐ CAM PKG VPR  
                   ☐ CAM CTN PREMIUM    ☐ CAM CTN COUPON    ☐ CAM CTN VPR

SALEM:

☐ SAL BXGXF    ☒ SAL PKG PREMIUM    ☐ SAL PKG COUPON    ☐ SAL PKG VPR  
                   ☐ SAL CTN PREMIUM    ☐ SAL CTN COUPON    ☐ SAL CTN VPR

Step 10:

Select the indicator with an "X" for the type promotion you are transferring allocations.

WKPM42N3

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VALUE ADDED TRANSFERS

TERR	ACCT	NAME	CITY	VAP WHOLESALER	UNIT	SKU
212402	300779	ZEBULON DRUG CO	ZEBULON	510056	30	2
212402	491115	ROSES #378	ZEBULON	510056	20	1
212402	046632	FOOD LION #341	ZEBULON	510056	40	2
212402	301770	PIGGLY WIGGLY 44	CREEDMOOR	510056	30	2

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---  
 PF11---PF12---

PREV BEGIN QTY SUMM UPD ACCT

MENU

Step 11:

A scroll list of accounts assigned to the VAP wholesaler you entered will be displayed.

- If you selected "National Promotional Indicators" for a premium program, the salable units and SKU units for each account will be displayed. If you selected coupon or VPR program, salable units only will be displayed.

- If you selected VAP Indicators, the SKUs will be displayed for each account.

WKPM42N3

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VALUE ADDED TRANSFERS

TERR	ACCT	NAME	CITY	VAP WHOLES.	UNIT	SKU
212402	300779	ZEBULON DRUG CO	ZEBULON	510056	30	2
212402	491115	ROSES #378	ZEBULON	510056	20	1
212402	046632	FOOD LION #341	ZEBULON	510056	40	2
121402	301770	PIGGLY WIGGLY 44	CREEDMOOR	510056	30	2
212402	099238	FOOD LION #223	BUTNER	510056	60	3
212402	193768	PIGGLY WIGGLY #23	FRANKLINTON	510056	10	1

INPUT OPTIONS

☐ USE DEFAULT QUANTITIES: \_\_\_\_\_  
☐ USE PERCENT DECREASE: \_\_\_\_\_  
☒ TIME PERIOD IN WEEKS: 4  
 PF5 = ESCAPE

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---  
 PF11---PF12---

PREV BEGIN QTY SUMM UPD ACCT

MENU

Step 12: (Optional)

If you need to make mass adjustments to the indicator quantities for Valued-Added Transfer, select the "PF3" key. The options are:

USE DEFAULT QUANTITIES:

Enter default quantity to be given to each account. The quantity entered cannot exceed the salable units currently displayed.

USE PERCENT DECREASE:

Enter the percent to decrease each quantity. No account can be reduced to "0".

TIME PERIOD IN WEEKS:

The salable units displayed are a two-week time period. Enter the number of weeks the promotion will be worked (max. no. is 6 wks.). PF6 allows you to jump to specific account.

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# VAP TRANSFER - PREMIUMS, COUPONS, VPRs (CONTINUED)

WKPM42N9 - M42                      VALUE ADDED TRANSFER

PROGRAM: 300286 SALEM 1QTR B2GF CORDUROY HAT  
 DRIVE PERIOD: JANUARY, 1993                      PACKING: 20 /SKU

DIVISION	TOTAL SALABLE UNITS	TOTAL SKU'S	SMS ALLOCATION BALANCE	LEVEL
2124XX	570	29	10	D
2126XX	1,575	79	25	D

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---  
 PREV  
 End of Data...

## Step 13: (Optional)

Select PF4 Key for summary screen of total SKUs to be transferred by division. For premium program selected, the salable units are converted to SKUs at the account level and totaled by division.

If coupon or VPR program was selected, the salable units are converted to SKUs at the division level and totaled by division. This screen also displays the current SMS allocations for the item and the level at which the allocation currently resides.

"D"-Division, "R"-Region

"A"-Area, "N"-National

Enter PF1 to previous screen.

WKPM42NB - M42                      VALUE ADDED TRANSFER

PROGRAM: 300286 SALEM 1QTR B2GF CORDUROY HAT  
 DRIVE PERIOD: JANUARY, 1993                      PACKING: 20 /SKU

DIVISION	TOTAL SALABLE UNITS	TOTAL SKU'S	SMS ALLOC BAL. & LEVEL
2124XX	570	86	10 D
2126XX	1,575	237	25 D
TOTAL	2,145	323	35

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---  
 PREV BEGIN                      UPD

## Step 14:

Select PF5 Key for "Transfer Worksheet" of total SKUs to be transferred by division. This screen in the final review screen for allocation adjustments by sales level. Total SKUs for transfer are displayed in the "Total" line. You may adjust SKU quantities by sales level. By typing over the quantities, you may make changes. However, the sum of the adjusted SKUs must equal the total SKUs displayed at the bottom. The SKU totals cannot exceed the SMS allocations at any level of the allocation.

Press "PF5" when you are ready to submit the transfer or "PF1" to abort the transfer. The list of accounts you have transferred allocations for will be saved for viewing or printing. - You have completed the transfer process. The "Transfer Allocation Report" will automatically be transmitted to the participating divisions, CAMs who have headquarter responsibilities and to your printer. For "Customized Summary Report", see page 7 for instructions.

## REMINDER:

- If the SMS item allocations are at a higher level than division, the division totals will be summarized at the higher level and transferred at that same level. The adjustments must be made at the higher level as well.
- If the quantity field does not allow you to change the units of SKUs, these quantities have been protected because account quantities have been previously transferred for this promotional item/drive period.

Please review the following set of procedures before using the BSGSF transfer function.

## II. VAP TRANSFER - BSGSFs

- Step 1: Select "Master List" from SIS menu.  
 Step 2: Enter function "M40" - VAP function.  
 Step 3: Enter "M41" (BSGSF Product).  
 Step 4: Enter "VAP Wholesaler Number" for the direct account assembling/delivering the promotion you are transferring items for.  
 (The VAP Wholesaler Number entered must be a valid direct account in your geographic location.)

```

WKPM41N1      VALUE ADDED QUANTITY TRANSFER
                (BSGSF PRODUCT)

PLACE AN 'X' NEXT TO THE PROMOTION YOU WANT TO SELECT

      PROM   PROMOTION DESCRIPTION   PROM   PROMO.DESCRPTION
      -----
      950    SPECIAL PROMOTION       999    BALANCE OF ORDER
      X 300230 WIN. B1CG5 FREE PKS Q1 300296 VAN. B3G2F 1ST/2ND QTR
      - 300312 VAN. B1CTN/G5F-1ST & 300316 NOW 1ST QTR B1G1F
      - 300338 MORE 1ST QTR B1G1F    300478 VAN. B1G1F 1ST/2ND QTR

Enter
  
```

Step 5:  
 Select with an "X" the BSGSF Promotion you are transferring and press enter.

```

WKPM41N1      VALUE ADDED QUANTITY TRANSFER
                (BSGSF PRODUCT)

PLACE AN 'X' NEXT TO THE PROMOTION YOU WANT TO SELECT

      PROM   PROMOTION DESCRIPTION   PROM   PROMO.DESCRPTION
      -----
      950    SPECIAL PROMOTION       999    BALANCE OF ORDER
      300230 WINS. B1CG5 FREE PKS Q1 300296 VAN. B3G2F 1ST/2ND QTR

                DRIVE PERIOD SELECTION
                ***** MARK YOUR SELECTION WITH X *****

                X 301-00      - 302-00      - 303-00
                -              -              -

                PRESS ENTER TO CONTINUE
  
```

Step 6:  
 Select the drive period you are transferring allocations for with an "X" and press enter.  
 Note: You may only transfer once per drive period/per item/per account.

```

WKPM41N1      VALUE ADDED QUANTITY TRANSFER
                (BSGSF PRODUCT)

PLACE AN 'X' NEXT TO THE PROMOTION YOU WANT TO SELECT

      PROM   PROMOTION DESCRIPTION   PROM   PROMOTION DESCRIPTION
      -----
      950    SPECIAL PROMOTION       999    BALANCE OF ORDER
      X 300230 WIN. B1CG5 FREE PKS Q1 300296 VAN. B3G2F 1ST/2ND QTR

                IND. TYPE SELECTION
                PROMOTIONAL: X
                VAP: _____
  
```

Step 7:  
 For the BSGSF program selected, you may select "National Promotional Indicators" or "VAP Indicators" to determine quantities.

Note: Indicator quantities must be used in order to utilize this function.

**Definitions:** National Promotional Indicators: Indicators by brand and vehicle in salable units for a two-week time period entered by Sales Reps.  
 VAP Indicators: Indicators in SKUs which can be used for premium and BSGSF programs only (PP Pack #1, PP Pack #2, PP Pack #3, PP Ctn, PP Extra SKU, VAP Over-ride Qty.). On October 4, the VAP Indicators will no longer be available.

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## II. VAP TRANSFER - BSGSFs (CONTINUED)

WKPM42N5 - M42      VALUE ADDED QUANTITY TRANSFER

WINSTON:

☒ WIN BXGXF      ☐ WIN PKG PREMIUM      ☐ WIN PKG COUPON      ☐ WIN PKG VPR

☐ WIN CTN PREMIUM      ☐ WIN CTN COUPON      ☐ WIN CTN VPR

CAMEL:

☐ CAM BXGXF      ☐ CAM PKG PREMIUM      ☐ CAM PKG COUPON      ☐ CAM PKG VPR

☐ CAM CTN PREMIUM      ☐ CAM CTN COUPON      ☐ CAM CTN VPR

SALEM:

☐ SAL BXGXF      ☐ SAL PKG PREMIUM      ☐ SAL PKG COUPON      ☐ SAL PKG VPR

☐ SAL CTN PREMIUM      ☐ SAL CTN COUPON      ☐ SAL CTN VPR

### Step 8:

Select the indicator with an "X" for the type of promotion you are transferring allocations.

WKPM42N3      18 OF 230      VALUE ADDED TRANSFERS

TERR	ACCT	NAME	CITY	VAP WHOLESALE	UNITS	SKU
212402	98814	FOOD LION #99	LOUISBURG	510056	20	1
212402	225605	ROSES #434	WAKE FOR.	510056	20	1
212402	193757	WINN DIXIE 807	LOUISBURG	510056	20	1
212402	300579	WINN DIXIE 845	ZEBULON	510056	20	1

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---  
PREV BEGIN QTY SUMM UPD ACCT MENU

### Step 9:

A scroll list of accounts assigned to the VAP wholesaler you entered will be displayed.

- If you selected "National Promotional Indicators" for a BSGSF program, the salable units & SKUs for each account will be displayed.
- If you selected "VAP Indicators", the SKUs will be displayed for each account.

WKPM42N3      18 OF 230      VALUE ADDED TRANSFERS

TERR	ACCT	NAME	CITY	VAP WHOLESALE	UNITS	SKU
212402	98814	FOOD LION #99	LOUISBURG	510056	20	1
212402	225605	ROSES #434	WAKE FOR.	510056	20	1
212402	193757	WINN DIXIE 807	LOUISBURG	510056	20	1
212402	300579	WINN DIXIE 845	ZEBULON	510056	20	1

INPUT OPTIONS

☐ USE DEFAULT QUANTITIES: \_\_\_\_\_

☐ USE PERCENT DECREASE: \_\_\_\_\_

☒ TIME PERIOD IN WEEKS: 4

PF5 - ESCAPE

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---  
PREV BEGIN QTY SUMM UPD ACCT MENU

### Step 10:

(Optional)

If you need to make mass adjustments to the indicator quantities for Value-Added Transfer, select the "PF3" key.

The options are:

USE DEFAULT QUANTITIES:

Enter default quantity to be given to each account. The quantity entered cannot exceed the salable units currently displayed.

USE PERCENT QUANTITIES:

Enter the percent to decrease each quantity. No account can be reduced to "0".

TIME PERIOD IN WEEKS:

The salable units displayed are a two-week time period. Enter the number of weeks the promotion will be worked (max. no. is 6 weeks). PF6 allows you to jump to specific account.

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## II. VAP TRANSFER - BSGSFs (CONTINUED)

WKPM41N9                      VALUE ADDED TRANSFERS (BXGXF)

PROM: 300230 WINSTON B1CG5 FREE PKS Q1  
Period: 301-00

DIVISION	TOTAL SALEABLE UNITS	TOTAL SKUS (20/SKU)	WINSTON GRATIS	WINSTON 100 GRATIS
			(CASES) BALANCE	BALANCE
2124XX	800	40	100	100
2126XX	1200	60	500	500

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--  
PREV                      BKWRD FWRD LEFT RIGHT                      MENU

**Step 11: (Optional)**  
Select the PF4 key for summary screen of total cases available for transfer for each division. The "Total Saleable Units" Column represents the actual number of total units required for those accounts in the division. The "Total SKUs" represents the number saleable units: 20. The "balance" column is the number of cases each div. has available by brand style. (Press PF7 to shift left or PF8 to shift right to view additional brand styles.)  
When you have completed the review, press PF1 to return to previous screen.

WKPM41N9                      VALUE ADDED TRANSFERS (BXGXF)

PROM: 300230 WINSTON B1CG5 FREE PKS Q1  
Period: 301-00

DIVISION	TOTAL SALEABLE UNITS	TOTAL SKUS (20/SKU)	ADJUST	WINSTON GRATIS	WINSTON 100 GRATIS
				(CASES) BALANCE	BALANCE
2124XX	800	40	1	99	99
2126XX	1200	60	2	498	498

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--  
PREV                      BKWRD FWRD LEFT RIGHT                      CMND

**Step 12:**  
Select the PF5 Key for "Transfer Worksheet".  
This screen provides you a summary of the "Total Saleable Units" and the total SKUs and the balance of cases available by divisions.  
You must enter the number of cases required for the transfer under the "Adjust" column for each brand style. (Press PF7 to shift left or PF8 to shift right to view additional brand styles.)  
**Note:** Due to the numerous BSGSF configurations, case requirements are not automatically calculated. A guideline to follow is: 12M case= 300 B1G1F offers.  
- Press "PF5" when you are ready to submit the transfer or PF1 to abort the transfer. The list of accounts you have transferred allocations for will be saved for viewing or printing.  
- This transfer is automatically made in the "Promotional Product Allocation" system and is allocated to the VAP account level.  
- You have completed the transfer process. The "Transfer Allocation Report" will automatically be transmitted to the participating divisions, CAMs who have headquarter responsibilities and to your printer. For customized report, see page 7 for instructions.

### REMINDER

If the adjust field does not allow you to change the units of SKUs, these quantities have been protected because account quantities have been previously transferred for this promotional item/drive period.

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Please review the following set of procedures before using the Customized Summary Report.

### III. CUSTOMIZED SUMMARY REPORT OF VAP TRANSFERRED PROMOTION(S)

Step 1: Select "Master List" from SIS menu.

Step 2: Enter function "M01" - Master List Selection menu.

Step 3: Select accounts you wish to view or print.

Displayed: 15 of 182 Account Scroll - M03 Page 1 of 7

Acct	Name	Address	City	Chain Id	WCV
305462	JEFF'S GROCERY	RT. 1, HWY. 268 E.	PINNACLE		100
098071	JT'S 52 GULF	RT 1 COOK SCH. RD	PILOT MTN	1589	100
302255	DOWELL BROS	2038 ROCKFORD	MT AIRY	17110336	500
269447	GANT OIL #4	HWY. 89	MT. AIRY	03360111	100

NOTE: 'X' Accts to View Detail, 'A' in Top Acct to view all Selected Accts  
PF1 = Account Selection Menu PF2 = Begin of Acct Group  
PF10 = Left PF11 = Right PF9 = Contracts Next Function<?>: M73

Step 4:

The scroll list of accounts which you selected will appear on the screen. Enter M73 in the next function/key.

WKPM73N1 - M73 VAP ACCOUNT LISTING

Please Enter One Of The Following:

Program Number: 300275

OR

X ENTER 'X' TO SELECT ALL PROGRAMS

NEXT FUNCTION: \_\_\_\_\_

PF1 ==> RETURN TO MAIN MENU

Step 5:

Enter the program number.

or  
Enter "X" to select all programs. (If the "all" option is selected, the display will be by territory and will break by account. The print option is not available for "all".) Press enter.

WKPM73N1 - M73 VAP ACCOUNT LISTING

DRIVE PERIOD SELECTION

\*\*\*\*\* MARK YOUR SELECTION WITH X \*\*\*\*\*

<u>X</u>	301-00	___	302-00
___		___	
___		___	
___		___	

PRESS ENTER TO CONTINUE

PF1 ==> RETURN TO MAIN MENU

Step 6:

Select with an "X" the specific drive period and press enter.

WKPM73N2 - M73 VAP ACCOUNTS LISTING

PROGRAM NUMBER: 300275 DRIVE PERIOD: Jan 03

WHSLER	ACCT	TERR	NAME	CITY	ITEM	QUANTITY
510056	305462	212602	JEFF'S GROCERY	PINNACLE	219991	20
510056	098071	212602	JT'S 52 GULF	PILOT MTN	219991	20
510056	302255	212602	DOWELL BROS	MT AIRY	219991	20
510056	269447	212602	GANT OIL #4	MT. AIRY	219991	20

PF1 ==> RETURN PF5 ==> PRINT

Step 7:

The summary will appear on the screen. You may "print screen" or press PF5 for print options.

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### III. CUSTOMIZED SUMMARY REPORT OF VAP TRANSFERRED PROMOTION(S) (CONTINUED)

REPORT DESTINATION: 9700

NO OF COPIES: 01

You may choose the sequence and page break criteria for your report.  
Use 1 thru 9 to indicate priority of SEQUENCE (1=highest, 9=lowest)  
Use X's to indicate where you would like PAGE BREAKS to occur  
If these selections are ignored, standard defaults will be taken.

SELECT SORT CRITERIA	5	SALES LEVEL	3	STATE
(1=highest 9=lowest)	4	CITY	1	TERRITORY/ROUTE
	6	ACCOUNT NUMBER	2	TAX JURISDICTION

SELECT PAGE BREAKS		SALES LEVEL	X	STATE
(use X's to select)		CITY	X	TAX JURISDICTION
	X	SUPPLIER		CHAIN ID

PF1 ==> ESCAPE

#### Step 8:

Enter Report Destination  
and Number of Copies  
required.

The select Sort Criteria may  
be requested by entering  
numbers 1 up to 6  
according to your  
preference of the layout of  
the report. Enter 1-6 to  
determine the sort  
sequence your report will  
be printed in. In the  
example on the left, this  
report will be printed in the  
following sequence.

- Territory/Route
- Tax Jurisdiction
- State
- City
- Sales Level
- Account Number

Note: Although six sort  
criteria categories are  
available, the instructions  
on the screen indicate 9 for  
future categories that may  
be needed.

Enter "X" on the categories  
you need "page breaks".  
Press enter.

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Please review the following set of procedures before using the Mass Update Wholesaler Numbers.

#### IV. MASS UPDATE VAP WHOLESALER NUMBERS FOR MASTER LIST ACCOUNTS

- Step 1: Select "Master List" from SIS menu.  
Step 2: Enter function "M01" - Master List Selection menu.  
Step 3: Select accounts to update.

Displayed: 15		of 620		Account scroll - M03		Page 1 of 4	
Acct	Name	Address	City	Chain Id	WCV		
519929	AMOCO FOOD SHOP#23	325 ROOSEVELT AVE.	WAKE FOREST	3908	105		
300708	COOK'S GROCERY	103 WHITE STREET	WAKE FOREST		100		
558555	WAKE FOREST DELI&G	711 N. MAIN STREET	WAKE FOREST	54583390	100		
897645	COUNTRY CORNER GROC	604 JONES DAIRY RD	WAKE FOREST		75		
300627	VARIETY PIC-UP #37	135 W. MAIN ST.	YOUNGVILLE		172		

NOTE: 'X' Accts to View Detail, 'A' in Top Acct to view all Selected Accts  
PF1 = Account Selection Menu PF2 = Begin of Acct Group  
PF10 = Left PF11 = Right PF9 = Contracts Next Function<?>: M76

- Step 4:  
The scroll list of accounts which are to be updated appear on the screen.  
Enter M76.

WKPM76N1 MASS UPDATE VAP WHOLESALER ID

ENTER VAP WHOLESALER ACCOUNT: 510056

ACCOUNTS SELECTED: 620

PF1==>RETURN

- Step 5:  
Enter the VAP wholesaler number for the account you selected from scroll list.  
Press enter.

WKPM76N1 MASS UPDATE VAP WHOLESALER ID

ENTER VAP WHOLESALER ACCOUNT: 510056 TAYLOR OIL CO. HDQTR

ACCOUNTS SELECTED: 620  
ACCOUNTS UPDATED: 620

\*\*\*\*\* UPDATE COMPLETED \*\*\*\*\*

PF1==>RETURN

- Step 6:  
"Confirmation of Update" -  
The Wholesaler Account information is automatically updated.

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**COORDINATING VALUE-ADDED PROGRAMS**

- V. After transfer completion, order premiums, BSGSF or regular product for promotional use to appropriate direct accounts (see Chapters 3 and 4). Ordering is done by Coordinator, except in Direct Chains where CAMs handle, if necessary.
- VI. Communicate program details to each direct account. To assist in accomplishing this frequent task, develop standardized "VAP Promotion Profile Packet" for use in communicating with wholesaler. This packet should contain form letters, spreadsheets, etc. which indicate:
- Promotion description
  - Shipped Quantities
  - SKU packing
  - Type of offer (i.e., 2 pack, 3 pack, 4 pack, etc.)
  - Packing instructions
  - Arrival date
  - Scroll detail of retail accounts to receive shipment (by state if more than one state being shipped to)
  - Billing date, EFTs amount, ship date
  - Cube, if necessary
  - Weight, if necessary

This packet should be utilized as required by direct accounts. Following are sample pages from the VAP Promotion Profile Packet.

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## COORDINATING VALUE-ADDED PROGRAMS

Page 1



March 23, 1993

Mr. Frank N. Stein  
 Minter-Weisman Co  
 1035 Nathan Lane North  
 Minneapolis, MN 554411

Subject: Camel Special Light Buy One Get One Free - Ship Date 4/19/93

Dear Frank,

R.J. Reynolds will be working a Buy One Get One Free promotion on Camel Special Lights under our Value Added program. Displays should be shipped the week of 4/19/93. Listed below are the details of this promotion.

Case Codes:	Camel Special Lt. Box KS	66640
	Camel Special Lt. Box 100	66740
	Camel Special Lt SP	66540

## Product Quantities:

State	Box KS	Box 100	SP KS	EET \$	Ship
Illinois					
Indiana					
Iowa					
Michigan					
Minnesota	54	54	36	49383.69	4/1/93
Nebraska					
North Dakota					
South Dakota					
Wisconsin					
Sales Rep (MN)	22	25	7	SEE MN	4/1/93

## State Breakdown:

State	# of Displays
Illinois	
Iowa	
Indiana	22
Michigan	
Minnesota	3
Nebraska	789
North Dakota	22
South Dakota	35
Wisconsin	192

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**COORDINATING VALUE-ADDED PROGRAMS**

Page 2

March 23, 1993

Page Two

Packing: Packing for this display will consist of the following:

3 cartons Camel Special Lt Box BIGIF  
3 cartons Camel Special Lt Box 100 BIGIF  
2 cartons Camel Special Lt SP BIGIF

Each display holds 40 BIGIF units. Product should be removed from the white cartons and packed in a specially designed sleeve. These sleeves are packed 40 per box and this box will serve as a shipper for the display. Sleeves will arrive approximately at same time as the product.

Attached is a Value Added Contract that indicates how much you will earn for packing this promotion. We appreciate your participation in this program. If you have any questions regarding this information, please do not hesitate to call.

Sincerely,

**Holly W. Woo**

Holly W. Wood  
Personnel & Administration Manager  
6432 Cecilia Circle  
Bloomington, MN 55439  
Phone (612) 841-4905  
Fax: 612 841-4906

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# COORDINATING VALUE-ADDED PROGRAMS

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## Sample Addendum



### ADDENDUM TO VALUE ADDED PROGRAM MASTER CONTRACT BETWEEN JOE'S WHOLESALE COMPANY AND RJRT

#### Promotional Quantities/Requirements/Outline

R.J. Reynolds Tobacco Company will ship 144 cases of Camel Special Light BIGIF product into Joe's Wholesale Company. This product should be packed in shipping cases to the appropriate specifications and shipped to designated accounts.

#### Promotional Delivery Timeframes - (1) to Distributor from RJRT and (2) to Retailer from Distributor:

Product will be delivered to your warehouse April 1, 1993 for distribution the week of April 19, 1993.

#### Designated Retailers:

R.J. Reynolds Tobacco Company will provide an account list to the distributor for shipment the week of April 19, 1993.

RJRT shall pay the Distributor payment at the rate of \$9.00 per 12M BIGIF case (144 cases of BIGIF 12M cigarettes x \$9.00 = \$1,296.00)

#### RJRT REPRESENTATIVE

Name Holly W. Wood

Title Personnel & Administration Manager  
Region Operations Office

Date: March 23, 1993

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## COORDINATING VALUE-ADDED PROGRAMS

## Sample VAP Account Scroll List Detail

GHC726BN		VAP ACCOUNT SCROLL LIST DETAIL REPORT											
		WATSON 4328											
		WATSON COMPANY, INC 323249											
SUPPLIER	ACCOUNT	YEAR	NAME	ADDRESS	CITY	ST	PP01	PP02	PP03	EXTRA 77 SRIS	VAP TOTAL	VAP OVR	DIV ALLOC
337220	451739	632607	COUNTRY LINE LIQUOR	6623 N LAKE BLVD	FOREST LAKE	MI	0	0	0	0	0	0	0
416550	342586	632607	MONTESOUN LIQUOR	50 MAIN STREET	ELK RIVER	MI	1	0	0	0	1	0	1
	946161	632607	CENEX CONVENIENCE	13574 WEST HWY 10	ELK RIVER	MI	1	0	0	0	1	0	1
	950225	632607	PRINCETON TOWN MKT	211 N LA GRANDE	PRINCETON	MI	0	1	0	0	2	0	2
	408227	632607	BONS COUNTRY EXPRESS	JCT 155 & 95 BOX 214	PRINCETON	MI	1	0	0	0	1	0	1
	874150	632607	MURRAY'S CORNER STORE	34070 BELLEVUE ST SW	PRINCETON	MI	0	1	0	0	2	0	2
577570	237473	632607	SHORT STOP SUPERETTE	9772	GRAND RAPIDS	MI	1	0	0	0	1	0	1
362231	437285	632607	COLONIAL LIQUOR	25 N LAKE ST	FOREST LAKE	MI	1	0	0	0	1	0	1
72800	860149	632607	WAZZEM'S PLACE	155 1ST STREET SW	HILLHAVEN	MI	1	0	0	0	1	0	1
TOTAL ACCOUNTS - 9							6	2	0	0	10	10	0
TOTAL ACCOUNTS - 9							6	2	0	0	10	10	0

VIII. Follow-up via phone with direct account to determine status, excess promotions, etc. As problems arise with excess promotions, Coordinator will contact appropriate RJR Chain Account Managers to make arrangements to ship excess promotions as possible.

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Chapter 3  
Ordering BSGSF's

51843 5150

**ORDERING BSGSFs****Preliminary Activities**

- ◆ Develop spreadsheets noting all Region direct accounts, SIS numbers and contact people
- ◆ Develop spreadsheets indicating sales reps and direct accounts to which the product(s) should be shipped

**Procedures**

- I. Gather Ship-to and quantity information for order processing. Refer to Workplan Book and VAP needs to obtain quantities.
- II. Gain approval from direct account to ship promotional product, if required. This would also include obtaining purchase order number, if required. This approval and PO number is obtained by calling the direct account.
- III. Where necessary, calculate state breakouts prior to ordering. Company guidelines require breaking up orders into separate "by state" orders when incoming BSGSF product will be shipped to more than one state.

Each state maintains different levels of taxation on cigarettes, and RJR reimburses Direct Accounts for tax stamps used on gratis product.

- For example, direct account XYZ has been allocated 20 cases of BIGIF product. It will be shipping 1/2 of this product to Wisconsin and 1/2 to Minnesota. In order to ensure the Direct is properly reimbursed for tax stamps on the gratis product, the order must be broken up into two separate 10 case orders — one to Wisconsin and one to Minnesota. Unless instructed otherwise, the Order Department will reimburse all tax stamps for gratis product based on the state in which the Direct Account resides.

The Promotional Product Allocation screen is then utilized to officially allocate the product to each Direct Account. In addition, these screens offer several other options to assist with the handling of promotional products (BIGIFs, B2G1Fs, etc.)

- Inquiries by sales level
- Transfer allocations
- Direct Allocation Inquiry by Promotion

Many of these utilities will be utilized when coordinating BSGSF promotions. Note that this system must be accessed and product placed into allocation BEFORE the order can be placed.

## USING PROMOTIONAL PRODUCT ALLOCATION SCREENS

1. With the SIS Main Menu displayed, place an "X" beside BUSINESS INFORMATION and press [ENTER].

GHCND130N                      SALES INFORMATION SYSTEM                      05/13/93 15:39:07

APPLICATION SELECTION MENU

MASTER LIST

MANAGEMENT SUMMARIES

CHAIN HEADQUARTERS

PAYMENT SYSTEMS

PRINT REPORT

HAND-HELD MESSAGES

DOCUMENTATION TRANSPORTER

(X) SALES LEVEL SHIPPING ADDRESS

BUSINESS INFORMATION

SALES EXPENSE

LABOR REPORTING

SALES MATERIALS

BULLETIN BOARD

PLACE AN X NEXT TO ONE OPTION.

PRESS THE PF1 KEY TO LEAVE THE SALES INFORMATION SYSTEM.

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# ORDERING BSGSFS

3

2. With this screen displayed, place an "X" beside PROMOTIONAL PRODUCT ALLOCATION and press [ENTER].

VER090M1 BUSINESS INFORMATION 05/13/93 15:39

DATA AVAILABILITY

RJR VOLUME - PRINTED REPORTS

RJR VOLUME INQUIRIES

RJR DOLLAR SALES INQUIRIES

☒ DIRECT ACCOUNT RELATED FUNCTIONS

PROMOTIONAL PRODUCT ALLOCATION

MSA INFORMATION INQUIRIES - STANDARD GEOGRAPHICAL

MSA INFORMATION INQUIRIES - TRADE SEGMENTS

MSA INFORMATION INQUIRIES - MILITARY

MSA INFORMATION - PRINTED REPORTS

PLACE AN 'X' NEXT TO ONE OPTION

PRESS THE PF1 KEY TO RETURN TO THE SIS MAIN MENU

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## ORDERING BSGSFs

3. With the Promotional Product Allocation Menu displayed, place an "X" beside BIGIF PRODUCT ALLOCATION and press [ENTER].

The screenshot shows a terminal window with a dark border. At the top, it displays 'WKP600N1', 'PROMOTIONAL PRODUCT ALLOCATION MENU', and '05/13/93 15:40'. The main menu lists three options: 'X BIGIF PRODUCT ALLOCATION', 'NEW BRAND ALLOCATION', and 'NEW BRAND GENERATION'. Below the menu, instructions read: 'PLACE AN X NEXT TO ONE OPTION' and 'PRESS PFL TO RETURN TO THE BUSINESS INFORMATION MENU'.

◆ *Note:* BIGIF product allocation should be utilized for all BSGSF.

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## ORDERING BSGSFS

## Allocation by Sales Level

4. The following screen will be displayed. Enter the promotion number in the PROMOTION field and place an "X" beside ALLOCATION BY SALES LEVEL and press [ENTER].

WXP601M1 PROMOTIONAL PRODUCT ALLOCATION 05/13/93 - 15:40

SALES LEVEL: 6326

PROMOTION: 306777

PRODUCT ALLOCATION:

- ☒ ALLOCATION BY SALES LEVEL
- INQUIRY BY ACCOUNT NUMBER
- TRANSFER ALLOCATIONS
- DIRECT ALLOC INQUIRY BY PROMOTION

PRINTED REPORTS:

- ALLOCATIONS VERSUS ORDERS
- DIRECT ACCOUNT ALLOCATIONS

PRESS F7 FOR LIST OF PROMOTIONS  
PRESS F1 TO RETURN TO THE BUSINESS INFORMATION MENU

- This selection is made by the PRC to allocate individual cases, by brand style, to each direct account desired.
- Prior to ordering any BSGSF product, this selection **MUST** be utilized.
- If the PRC is in the Region Business Information System, allocations will be shown by Division.
- If in at Division level, allocations will be shown by Direct Account.

## ORDERING BSGSFS

- ♦ *Note:* If you don't have the promotions number or you want to display a list of every BSGSF promotions, press [PF3]. The promotions can be obtained from this list. Following is a sample of the screen you receive when you press [PF3]. Press [ENTER] to exit to the previous screen.

WKP60182		PROMOTIONAL PRODUCT ALLOCATION	05/13/93 - 15:42:00.2
PLACE AN 'X' NEXT TO THE PROMOTION YOU WANT TO SELECT			
FROM	PROMOTION DESCRIPTION	STATUS	
----	-----	-----	
- 200	SALEM GOLD/CAMEL BIGIF	CLEAN-UP	
- 226	DORAL FF 100 BIGIF	CLEAN-UP	
- 230	LEWIS BIGIF	CLEAN-UP	
- 231	LEWIS BIGIF	CLEAN-UP	
- 425	SALEM BIGIF	CLEAN-UP	
- 432	SALEM BIGIF	CLEAN-UP	
- 434	SALEM BIGIF	CLEAN-UP	
- 436	SALEM BIGIF	CLEAN-UP	
- 437	VANTAGE ULTRA BOX BIGIF	CLEAN-UP	
- 440	WINSTON BIGIF	CLEAN-UP	
- 444	STERLING BIGIF	CLEAN-UP	
- 445	CAMEL WIDE BIGIF	CLEAN-UP	
PRESS PF3 TO END SCROLL			
PRESS PF1 TO RETURN TO THE PROMOTIONAL PRODUCT ALLOCATION MENU			

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## ORDERING BSGSFS

5. From the Promotional Product Allocation screen, the following screen will be displayed. Place an "X" beside the desired brandstyle and press [ENTER].

WKP603N1      PROMOTIONAL PRODUCT ITEM SELECTION      05/13/93 - 15:42:37

PROMOTION: 300777    CAM RV BANDED BIGIF W/POS-CAT/  
PERIOD: 304-00

ITEM NUMBER	ITEM DESCRIPTION	ITEM NUMBER	ITEM DESCRIPTION
X 66640	CAMEL SPEC LT BX BIGIF-1		
- 66740	CAM SPEC LT BX 100 BIGIF		
- 66540	CAMEL SPECIAL LT BIGIF-1		

PRESS PF1 TO RETURN TO THE PROMOTIONAL PRODUCT ALLOCATION MENU



## ORDERING BSGSFS

6. The following screen will be displayed. Input the total amount of cases which need to be allocated to each Direct Account.

```

WKP606M1          PROMOTIONAL PRODUCT ALLOCATION          05/13/93 - 15:43

Sales Level: 6326 MINNEAPOLIS DIVISION
Promotion: 300777 Period: 304-00 Item: 66640 CAMEL SPEC LT BX BIC17-I
Total Allocated: 189 Allocation Available: 151

Account          Total      Order      Unsellable      Allocation
                  Allocated  Quantity  Product         Available
-----
0153000 M. AMUNDSON CIGAR AND 17
2089200 R. E. FRITE, INC. 11
2354400 GRANITE CITY JOBBING C 6
2366970 TWIN CITY A.P.B. EXCH.
2906300 BOYD HOUSE CANDY & TO 5
3216600 JUDE CANDY & TOBACCO C 4
4288800 HINTER-WEISMAN CO., IN 91
4536000 NASH FINCH COMPANY
4713310 VETERANS CANTEN SERV
4815060 HCO CLUB
6245200 SUPERAMERICA-DIVISION 17
6248600 SUPER VALU STORES INC

PF1 Promotional Product Allocation Menu PF8 Page Forward PF7 Page Backwards
  
```

- Allocations are made by typing in quantity desired on the appropriate line in the Total Allocated column and press [ENTER].
- The Allocation Available column will now indicate the total number of cases of the selected brand style available to order.
- When complete and orders are phoned/faxed to Winston-Salem, the amounts allocated will move from the Allocation Available column to the Order Quantity column, which indicates product order has been placed and processed.
- Even if the order is to be broken out by state, the quantity allocated must still remain the total amount needed by the Direct.

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## ORDERING BSGSFS

3

Inquiry by Account  
Number

1. Logon to the BUSINESS INFORMATION SYSTEM as described above. With the Promotional Product Allocation screen displayed, enter the desired promotion and place an "X" in the INQUIRY BY ACCOUNT NUMBER field and press [ENTER].

```
WXP601M1          PROMOTIONAL PRODUCT ALLOCATION          05/13/93 - 15:43

                                SALES LEVEL: 6326

PROMOTION: 308777    CAN RU BANDED B101Y W/POS-CAT/

PRODUCT ALLOCATION:
  ALLOCATION BY SALES LEVEL
  X INQUIRY BY ACCOUNT NUMBER
  - TRANSFER ALLOCATIONS
  - DIRECT ALLOC INQUIRY BY PROMOTION
PRINTED REPORTS:
  - ALLOCATION VERSUS ORDERS
  - DIRECT ACCOUNT ALLOCATIONS

PRESS PF3 FOR LIST OF PROMOTIONS
PRESS PF1 TO RETURN TO THE BUSINESS INFORMATION MENU
```

- ◆ **Note:** This task is utilized to inquire by account regarding allocated quantities. This selection is utilized to obtain the status of all allocated product for a given Direct Account.

## ORDERING BSGSFS

2. The following screen will be displayed.

```

WKP607N1          PROMOTIONAL PRODUCT ALLOCATION          05/13/93 - 15:44:38

ACCOUNT NO. 5516340
ACCOUNT NAME: HUB CITY FOODS, INC.
PROMOTION: 300777 CAM RU BANDED BIGIF W/POS-CAT/
PERIOD: 304-00

ITEM DESCRIPTION          TOTAL          ORDER          UNSELLABLE          ALLOCATION
                           ALLOCATED        QUANTITY        QUANTITY            AVAILABLE
-----
CAMEL SPEC LT BX BIGIF-I      52              52
CAM SPEC LT BX 100 BIGIF      52              52
CAMEL SPECIAL LT BIGIF-I      33              33

PRESS PF1 TO RETURN TO THE PROMOTIONAL PRODUCT ALLOCATION MENU
  
```

This screen indicates all brands allocated for a given promotion and the status of each.

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# ORDERING BSGSFS

## Transfer Allocations

1. Logon to the BUSINESS INFORMATION SYSTEM as described above. With the Promotional Product Allocation screen displayed, enter the desired promotion and place an "X" in the TRANSFER ALLOCATIONS field and press [ENTER].

```

WXP601N1          PROMOTIONAL PRODUCT ALLOCATION          05/13/93 - 15:52

                                           SALES LEVEL: 6326

PROMOTION: 30077_

PRODUCT ALLOCATION:
- ALLOCATION BY SALES LEVEL
- INQUIRY BY ACCOUNT NUMBER
X TRANSFER ALLOCATIONS
  DIRECT ALLOC INQUIRY BY PROMOTION
PRINTED REPORTS:
- ALLOCATION VERSUS ORDERS
- DIRECT ACCOUNT ALLOCATIONS

PRESS PF3 FOR LIST OF PROMOTIONS
PRESS PF1 TO RETURN TO THE BUSINESS INFORMATION MENU
    
```

This screen transfers allocations to other Divisions.

**ORDERING BSGSFS**

2. The following screen will be displayed. Place an "X" beside the desired item and press [ENTER].

WK7403N1      PROMOTIONAL PRODUCT ITEM SELECTION      05/13/93 - 16:27:28

PROMOTION: 300777    CAM RU BANDED BIGIF W/POS-CAT/  
PERIOD: 304-00

ITEM NUMBER	ITEM DESCRIPTION	ITEM NUMBER	ITEM DESCRIPTION
X 66640	CAMEL SPEC LT BX BIGIF-I		
66740	CAM SPEC LT BX 100 BIGIF		
66540	CAMEL SPECIAL LT BIGIF-I		

PRESS PF1 TO RETURN TO THE PROMOTIONAL PRODUCT ALLOCATION MENU

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## ORDERING BSGSFS

3

3. The following screen will be displayed. Enter the transfer information and press [ENTER].

WKF613M1 PROMOTIONAL PRODUCT ALLOCATION 05/13/93 16:34  
ALLOCATION TRANSFER

SALES LEVEL: 6326 MINNEAPOLIS DIVISION  
PROMOTION: 300777  
PERIOD: 304-00 ITEM: 66640 CAMEL SPEC LT BX BICIF-I  
TOTAL ALLOCATED: 189 ALLOCATION AVAILABLE: 0

TRANSFER TO SALES LEVEL: \_\_\_\_\_  
TRANSFER AMOUNT: \_\_\_\_\_

PRESS PF1 TO RETURN TO THE PROMOTIONAL PRODUCT ALLOCATION MENU

Because the Promotional Product Allocation Transfer screen doesn't track product transfers, this screen must be printed/faxed to appropriate Division on completion. This is the only way an operating unit can be assured a transfer has been completed.

## ORDERING BSGSFS

# Direct Allocation Inquiry by Promotion

1. Logon to the BUSINESS INFORMATION SYSTEM as described above. With the Promotional Product Allocation screen displayed, enter the desired promotion and place an "X" in the DIRECT ALLOC INQUIRY BY PROMOTION field and press [ENTER].

```

WKP601W1          PROMOTIONAL PRODUCT ALLOCATION          05/13/93  - 16:34

                                           SALES LEVEL: 6326

PROMOTION: 308777   CAN RU BANDED BIGIF W/POS-CAT/

PRODUCT ALLOCATION:
- ALLOCATION BY SALES LEVEL
- INQUIRY BY ACCOUNT NUMBER
- TRANSFER ALLOCATIONS
X DIRECT ALLOC INQUIRY BY PROMOTION
PRINTED REPORTS:
- ALLOCATION VERSUS ORDERS
- DIRECT ACCOUNT ALLOCATIONS

PRESS PF3 FOR LIST OF PROMOTIONS
PRESS PF1 TO RETURN TO THE BUSINESS INFORMATION MENU
  
```

- ♦ *Note:* This screen is utilized to double check the status of all shipments to the direct account in the Region and outside the Region, as necessary.

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**ORDERING BSGSFS**

2. The following screen will be displayed. Enter the desired account number in the ACCOUNT NUMBER field and press [ENTER].

WKP619W4      DIRECT ACCOUNT ALLOCATIONS INQUIRY      13/05/93  
Selection Menu      16:35:25

Account Number: 5516340  
Geographic Division: \_\_\_\_\_  
State: \_\_\_\_\_  
Account Name: \_\_\_\_\_  
Chain ID: \_\_\_\_\_ - XX - XX  
Paying Account Number: \_\_\_\_\_  
Parent Account Number: \_\_\_\_\_  
Segment: \_\_\_\_\_  
Account Type: ( D Domestic M Military/Inst.)

Enter=PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---  
Menu      CMD

- ◆ *Note:* This screen allows for Direct Account selection to review status of allocated product by a number of different options:

- Account number
- Geographic region
- State
- Account name
- Chain ID
- Paying account number
- Parent account number
- Segment
- Account type



## ORDERING BSGSFS

3. The following screen will be displayed. Enter the transfer information and press [ENTER].

```

WKP619M1          DIRECT ACCOUNT ALLOCATIONS INQUIRY          13/05/93
                                                            16:35:53
Sales Level: XXXX From: 300777 CAM RV Banded BIGIF W/POS-CAT/
Period: 304-00

```

Div	Account	Name	City	ST	Whse	BIGIF-1	CAMEL SPEC LT BX	CAM SPEC LT BX
6324	5516340	HUB CITY FOODS, 1 MARSHFIELD	WI	070		52		52

```

Enter--PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
Menu      Total Whse      Skurd Pord Left Right      CORD

```

## Placing Orders

- IV. Once quantities are finalized and entered into the system, contact Customer Services Department at 1-800-334-8682. This department closes at 4:15 pm EST. A three week lead time is required between order date and first possible ship date.
- V. Give the Customer Service Representative the following information:
- Give name and identify self as RJR employee
  - Promotion number
  - Direct account SIS # (note whether separate orders by state are to be placed)
  - Direct account EFT#
  - Purchase Order # (if required)
  - Delivery date
  - Brand style
  - Quantity

All information listed above will be confirmed by Customer Service Representatives. They will also provide the total EFT \$ amount and EFT bill date, if requested.

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## ORDERING BSGSFS

- VI. Communicate critical information to each direct account via letter. This letter should be standardized to expedite communication. If promotion is value-added program, the VAP packet will substitute for the letter.



March 19, 1993

CLICK DISTRIBUTING CO.

Attn: Bob White  
811 George St  
La Crosse, WI 54601

SUBJECT: Camel Buy 1, Get 1 Free

Dear Bill:

The Madison District has ordered the following promotional product to your warehouse. This promotion will be worked out by our Sales Representatives, Wendy Storm and Candy Barr. There will also be some pre-book orders, which will be forwarded to you.

Below is pertinent information for your records:

2 Cases	CAMEL Filter King	BIGIF
2 Cases	CAMEL Filter King Box	BIGIF
4 Cases	CAMEL Light King	BIGIF
4 Cases	CAMEL Filter Wides	BIGIF
1 Case	CAMEL Filter Wides	BIGIF
1 Case	CAMEL Wides Light	BIGIF

Deliver Date set for: March 30, 1993

Purchase Order No.: 030893JJG

Dollar Amount: \$3,978.20

If you have any further questions, please feel free to contact me.

Sincerely,

Will Payer

Will Payer

cc. Wendy Storm  
Candy Barr

- VII. After all orders have been placed, the PRC should recheck the appropriate Promotional Product Allocation screens to:

- Ensure all product has been allocated and ordered.
- Ensure no new allocations have been transferred into the system. If so, these additional quantities must be allocated and ordered.

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**ORDERING BSGSFs**

51843 5168

Chapter 4  
Ordering Premiums

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## ORDERING PREMIUMS

Preliminary  
Activities

## Task Overview

- ◆ Develop spreadsheets indicating ship-to locations for all sales reps in the Region. Master copy should be present when placing orders.

The SMS System provides several ordering functions, each tailored to the requirements of certain type orders:

- SMS 402 is used to fulfill supply requests, place a lone order to a single location, etc.
- SMS 422 is used when ordering the same item in the same quantity to a set of locations. It is most often used in POS, PDI shipment.
- SMS 425 is used to order different quantities of the same items to a set of locations.

Following is a synopsis of each function.

## Function 402

1. Log on to SMS and invoke function 402, Order Entry. The following screen is displayed:

402 CJ1572UN      SALES MATERIALS SYSTEM      01/19/93 08:16  
ADDRESS SCREEN 1      ORDER NUMBER: 3019-0043  
ORDERING REGION/DIVISION: 2126      FN: \_\_\_\_\_

SHIPPING DESTINATION: (SELECT ONE)

ACCOUNT NUMBER: \_\_\_\_\_ (SYS ACCOUNT NUMBER)  
DIVISION OFFICE: 2126 (REG/DIV NUMBER)  
TERRITORY: \_\_\_\_\_ (TERR. NUMBER FOR SALES REP. WAREHOUSE)

ENTER EMPLOYEE NUMBER: \_\_\_\_\_ (IF ORDER MEMO IS TO GO TO SALES REP.'S HOME)

PF12 - MAIN MENU      PF1 - HELP

2. Enter the appropriate information and press [ENTER]. For demonstration purposes we have entered a Division of 2126.

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## ORDERING PREMIUMS

3. The order entry ship-to screen will be displayed:

402 GJ1572UN	SALES MATERIALS SYSTEM ADDRESS SCREEN 2	02/23/93 10:03 ORDER NUMBER: 3054-0977 FBI
ORDERING OFFICE: 2126		
SHIP TO: ACCOUNT NUMBER:		
DIVISION OFFICE: 2126		
TERRITORY:		
SHIP TO ADDRESS: F. J. ARMSTRONG, JR.		
8100 NORTH POINT BLVD		
SUITE B		
WINSTON-SALEM NC 27105		
SALES REP. NUMBER:		
SALES REP.:		
ENTER - CONTINUE WITH ORDER		
PF3 - RETURN TO PREVIOUS SCREEN		
PF12 - MAIN MENU		
PF1 - HELP		

4. Verify that this information is correct.

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## ORDERING PREMIUMS

5. Press [ENTER] to continue. The order type selection screen will be displayed:

```
492 GJ1573UN          SALES MATERIALS SYSTEM          01/19/93 08:20
                        ORDER ENTRY SELECT              ORDER NUMBER: 3019-0056
                                                         PW: _____

Select one type of order entry:
  _ CATEGORY ORDER
  _ FORM/ITEMS ORDER
  _ MODULAR BOOK ORDER
  _ PROMOTION ORDER
  _ COPY EXISTING ORDER

OPTIONAL FUTURE DELIVERY - WEEK OF: _____ (YYMMDD format)

PF3 - RETURN TO PREVIOUS SCREEN
PF12 - MAIN MENU
PF1 - HELP
```

6. Select the type of order you wish to create:
- **CATEGORY ORDER** - Use this option when you wish to select the items to be ordered by category (such as Permanent POS, Premium, etc.).
  - **FORM/ITEMS ORDER** - Use this option when you know the item number(s) you wish to order.
  - **MODULAR BOOK ORDER** - Currently unavailable (future enhancement).
  - **PROMOTION ORDER** - Use this option to order items for a promotion.
  - **COPY EXISTING ORDER** - Use this option when the order you are creating is similar to an existing order, as some data entry can be omitted.
7. If you wish to enter an order for future delivery (instead of immediate delivery), enter the desired delivery date in the **WEEK OF** field. The date specified cannot be more than 210 days into the future, and must be entered in YYMMDD format.

---

## Summary of Process

8. Press [ENTER] to continue.
9. The next section contains a summary of the process for using any of the order types. It is followed by detailed instructions for each order type.
1. At the order type selection screen select the desired order type. If you wish to request a future delivery date, enter the desired date. The date cannot be more than 210 days into the future. It must be entered in YYMMDD format.
2. Press [enter] to continue.
  - *If you have requested a Category order:*
    - The system will prompt you to select a major category. For each major category selected, you must select at least one intermediate and minor category. Up to 4 major categories can be selected; up to 6 intermediate categories can be selected for each major category; up to 20 minor categories can be selected for each intermediate category.
    - When category selections are complete, the system lists the associated items. Enter the desired quantity of each item and press [PF4].
  - *If you have requested a Form/Items order:*
    - The system will prompt you to enter each item and the desired quantity. Enter the desired items/quantities and press [PF4].
  - *If you have requested a Promotion order:*
    - To view a specific type of promotion, position the cursor in the TYPE column and press [PF1] (HELP). Select the type of promotion you wish to view. (This step is optional.)
    - Select the promotion for which you wish to order items
    - The system will then list the items associated with the promotion. Enter quantities for the desired items and press [PF4].
  - *If you are copying an existing order:*
    - The system will prompt you to enter the existing order number you wish to copy items and quantities from.
    - The system will then list the items/quantities associated with the specified order. (This screen is similar to Form/Items Order.) Enter/modify items/quantities for the new order you are creating and press [PF4].

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## ORDERING PREMIUMS

4

3. The Order Review screen is displayed. You can modify the quantities on this screen but cannot add items. Press [PF4] to continue.
4. If all items requested are in inventory, the Order Completion screen is displayed. If all items are not in inventory the Inventory Exceptions screen is displayed.
5. From either screen you can request special handling.
6. When you are ready to process the order, press the appropriate PF key ([PF4] from the Order Completion screen; [PF4] or [PF5] from the Inventory Exceptions screen).

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## ORDERING PREMIUMS

## Category Order

Use this option when you want to select the items to be ordered by category, such as permanent POS items, premiums, coupons, etc.

1. When Category Order is selected, the Major Categories screen is displayed:

```

402 GJ1585UN          SALES MATERIALS SYSTEM          01/19/93 08:21
                        MAJOR CATEGORIES                ORDER NUMBER 3019-0056
                                                           PH1 /
PLACE AN 'X' NEXT TO CATEGORY(S) (MAXIMUM OF 4) YOU DESIRE AND PRESS ENTER:

- TEMPORARY POS      - Y PERMANENT POS      - CTN MERCH/ELEC SEC
- PACKAGE MERCH      - PERMANENT DISPLAYS  - SALES REP. SUPPLIES
- MILITARY           - VENDING              - PREMIUMS
- BANK MATERIALS     - SPCL/TEST ITEMS(TOB) - OFFICE SUPPLIES
- COUPONS            - REFURBISHING         - WOOD SPRING LD-SPEC
- ON-SERVS          - BANK MATERIALS

*** END OF CATEGORY ***

PF3 - RETURN TO PREVIOUS SCREEN
PF12 - RETURN TO MAIN MENU
PF1 - HELP
  
```

2. Enter X beside the categories you wish to select from. Up to 4 categories can be selected at one time.
3. Press [ENTER] to continue.

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## ORDERING PREMIUMS

4. The Intermediate Categories screen is displayed for the first major category selected:

402 021586UN      SALES MATERIALS SYSTEM      01/19/93 08:23  
INTERMEDIATE CATEGORIES      ORDER NUMBER: 3019-0056  
MAJOR CATEGORY: PERMANENT POS      PW: \_\_\_\_\_

PLACE AN 'X' NEXT TO CATEGORY(S) (MAXIMUM OF 6) YOU DESIRE AND PRESS ENTER:

X CAMEL	DORAL	SALEM
- WINSTON	- NEW/TEST	- ACCESSORIES
- LOGO ITEMS	- DECALS	- RIP + POS
- LOTTERY INSERTS	- RIP - POS	- REFURBISHING
- SPECIAL POS	- HORIZON	

\*\*\* END OF CATEGORY \*\*\*

---

PF3 - RETURN TO MAJOR CATEGORY  
PF12 - RETURN TO MAIN MENU      PF1 - HELP

5. Enter X beside the categories you wish to select from. Up to 6 categories can be selected at one time.
6. Press [ENTER] to continue. If multiple major categories were selected, intermediate categories for the next major category will be displayed. This process will continue until intermediate categories have been selected for each major category.

## ORDERING PREMIUMS

7. When intermediate categories have been selected for each major category, the Minor Categories screen is displayed. This screen lists minor categories for the first major/intermediate category combination:

```

402 GJ1887UN          SALES MATERIALS SYSTEM          01/19/93 08:31
                      MINOR CATEGORIES                ORDER NUMBER: 3019-0036
MAJOR CATEGORY: PERMANENT POS                          FM:
INT CATEGORY: CAMEL

PLACE AN 'X' NEXT TO CATEGORY(S) (MAXIMUM OF 20) YOU DESIRE AND PRESS ENTER,

  X POS ITEMS          - RIP          - NASA
  - NCSA              - NCSA          - SASA
  - FMBA              - DMBA          - NATIONAL

*** END OF CATEGORY ***

PF3 - RETURN TO INTERMEDIATE CATEGORY
PF12 - RETURN TO MAIN MENU                                PF1 - HELP
  
```

8. Enter X beside the categories you wish to select from. Up to 20 categories can be selected at one time.
9. Press [ENTER] to continue. If multiple intermediate categories were selected or multiple major categories were selected, minor categories for the next intermediate category will be displayed. This process will continue until minor categories have been selected for each major/intermediate category combination.

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## ORDERING PREMIUMS

10. When minor categories have been selected for all major/intermediate categories, the system will list the items associated with the category combinations requested. This list will begin with the first major/intermediate/minor category specified:

```

402  GJ1587U1          SALES MATERIALS SYSTEM          01/19/93 08:31
                          ITEM QUANTITY ENTRY          ORDER NUMBER: 3019-0056

MAJOR CATEGORY: PERMANENT POS
INT  CATEGORY: CAMEL
MINOR CATEGORY: POS ITEMS

SK  QTY  ITEM  ---DESCRIPTION---  UNITS/SKU  MAXIMUM  ORIGINAL  L  REMAIN
  QTY  QTY  QTY  QTY  QTY  QTY  QTY  QTY  QTY
208353 CAMEL 3-D CIGARETTES BOL 10 BOX
208408 CAMEL BUSINESS HOURS OPE 10 BOX
390898 CAMEL BATTERY CLOCK 6 BOX
390920 CAMEL FLOOR ASHTRAY 2 BOX
390942 CAMEL LANE CLOSED 20 BOX
390964 CAMEL NEON 1 BOX
391030 CAMEL PRICING BANNER 6'X 25 BOX
391063 CAMEL GROUND MOUNT 1 BOX
391074 CAMEL POLE MOUNT 1 BOX
391085 CAMEL CURB MOUNT 1 BOX

*** MORE DATA EXISTS ***

PF3 - PREVIOUS SCREEN
PF4 - CONTINUE WITH ORDER
PF7 - START OF DATA

PF12 - MAIN MENU
PF1 - HELP
  
```

11. For each item, this screen indicates the maximum order quantity, current allocation quantity, and remaining allocation quantity (if any).
12. Specify the quantity of each item you wish to order in the QTY field. If you do not want an item, leave the quantity field blank. If multiple pages of items exist, press [ENTER] to scroll forward.
13. If you have specified more than 1 major, intermediate or minor category, there will be a screen like this for each combination. Press [ENTER] to view additional screens of information and enter quantities.
14. When you have entered quantities for the desired items, press [PF4] to continue with the order.

**15. The system now displays the order for you to review:**

16. This is the SMS Order Review screen. It displays the required SKU quantity of each item requested and units per SKU. It also indicates the maximum order quantity, current allocation quantity, and remaining allocation quantity (if any).
17. As with the previous screen, you can modify the quantities indicated.
18. When you are ready to continue with the ordering process, press [PF4] to continue with the order entry process.

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## ORDERING PREMIUMS

19. The system now checks the inventory to determine if all of the items needed are available. If any of the requested items are *not currently in inventory*, a screen will be displayed which lists the items/quantities that will be placed on backorder. This screen allows you to:

- Continue with this order and put the missing items on back order
- Continue with this order and cancel items on back order
- Suspend the order, reserving inventory for the available items
- Cancel the order

(This screen is shown in the discussion on entering a promotion order.)

20. If all items *are in inventory*, the system will display the Order Completion screen:

402 GJ1584U1                      SALES MATERIALS SYSTEM                      01/19/93 08:33  
   ORDER COMPLETION                      ORDER NUMBER: 3019-0056

YOUR ORDER 3019-0056  
IS AVAILABLE FOR IMMEDIATE SHIPMENT.

ESTIMATED ORDER COST:                      235.36  
SPECIAL HANDLING COST:

---

PF4 - COMPLETE ORDER  
PF6 - SPECIAL HANDLING  
PF11 - RESTART ORDER  
PF12 - MAIN MENU (ABORT ORDER)

PF1 - HELP

21. This screen provides you with your order number and cost.

**WARNING:** This is the point of no return! If you go forward from here, an order will be generated.

## ORDERING PREMIUMS

22. From this screen you can:

- Press [PF4] to continue with the order entry process. This should only be used if you are sure you want to generate the order!
- Press [PF6] to request special handling.
- Press [PF11] to restart this order (return to order type selection screen). The order you have entered will be lost. This should be used if you wish to start over.
- Press [PF12] to abort this order (return to SMS Main Menu). The order you have entered will be lost.

23. If you need to request special handling, press [PF6]. The system will display a list of options for you to select from:

```

402  GJ  -----SPECIAL HANDLING CATEGORIES----- 08133
GP COST DESCRIPTION PHONE 9-0056
-----
12.99 THIS IS A TEST

PHONE NUMBER: (   )   -   -

Select up to 10 special handling items to be included with
your order (no duplicate group items allowed).
PF4 - Enter-PF1-PF2-PF3-PF4-PF5-PF6-PF7-PF8-PF9-
PF6 - HELP Cancel Cont BKWD FWRD
PF11 -
PF12 - -----HELP
  
```

24. Enter X beside each option needed. Up to 10 options can be selected. When you are ready to continue, press [PF4]. The system will return to the Order Completion screen and display the handling costs.

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25. If you wish to generate the order press [PF4]. Otherwise, use one of the other options.
26. When [PF4] is pressed, the following pop-up window will be displayed:

402 GJIS84U1                      SALES MATERIALS SYSTEM                      02/23/93 10:08  
ORDER COMPLETION                      ORDER NUMBER: 3054-0977

YOUR ORDER 3054-0977  
IS A FUTURE ORDER FOR 93-03-29

ESTIMATED ORDER COST:                      145.65  
SPECIAL HANDLING COST:                      12.99

-----SPECIAL INSTRUCTIONS-----  
Account Special Instructions: \_\_\_\_\_  
\_\_\_\_\_

27. Enter any special instructions or sales rep information in the space provided. This entry is optional. (This information was previously entered on the Address Screen, but was moved due to processing procedures.)
28. When you are ready to continue, press [ENTER]. The order is generated and the following screen is displayed:

## ORDERING PREMIUMS

GJ157801                      SALES MATERIAL SYSTEM                      12/17/92  
ORDER ENTRY COMPLETED                      ORDER NUMBER: 3019-0056

YOUR ORDER 3019-0056 HAS BEEN SUCCESSFULLY PROCESSED.

ESTIMATED ORDER COST :                      \$05.66  
SPECIAL HANDLING COST:                      12.99

\*\*\*\*\*  
ENTER - PROCESS A NEW ORDER WITH NEW SHIP-TO ADDRESS  
PF2 - PROCESS A NEW ORDER WITH SAME SHIP-TO ADDRESS  
PF12 - RETURN TO MAIN MENU

29. At this point, the system has adjusted the inventory to reflect your order, modified any allocations, and stored the order on the order file.

30. From here you can:

- Press [ENTER] to process another order with a different ship-to address
- Press [PF2] to process another order with the same ship-to address
- Press [PF12] to return to the SMS Order Entry Menu

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## Form/Items Order

**Use this option when you want know the item numbers of the items you wish to order. It allows you to enter the item numbers/quantities directly.**

- 1. When Form/Items Order is selected, the following screen is displayed:**

[illegible]

2. Enter the item number and quantity of each item you wish to order. Up to 60 different items can be specified.
3. Press [PF4] to continue. The Order Review screen will be displayed.

On this screen you can modify the SKU quantity. When you are ready to continue, press [PF4].

4. The system now checks the inventory to determine if all of the items needed are available.
  - If any of the requested items are *not currently in inventory*, a screen will be displayed which lists the items/quantities that will be placed on back-order.

**WARNING!** This is the point of no return! If you go forward from here, an order will be generated!

  - If all items *are in inventory*, the system will display the Order Completion screen. This screen provides you with your order number and cost.

**WARNING!** This is the point of no return! If you go forward from here, an order will be generated!
5. If you have reached the Order Completion screen, the same options are available as for the Category order type:
  - Press [PF4] to process this order. This should only be used if you are sure you want to generate the order!
  - Press [PF6] to request special handling.
  - Press [PF11] to restart this order (return to order type selection screen). The order you have entered will be lost. This should be used if you wish to start over.
  - Press [PF12] to abort this order (return to SMS Main Menu). The order you have entered will be lost.
6. When you are ready to generate the order, press [PF4]. The order is generated and the following screen is displayed:

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## ORDERING PREMIUMS

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GJ1578U1                      SALES MATERIAL SYSTEM                      12/17/92  
ORDER ENTRY COMPLETED                      ORDER NUMBER: 3154-1307

YOUR ORDER 3154-1307 HAS BEEN SUCCESSFULLY PROCESSED.

ESTIMATED ORDER COST :                      145.65  
SPECIAL HANDLING COST:

.....  
ENTER - PROCESS A NEW ORDER WITH NEW SHIP-TO ADDRESS  
PF2 - PROCESS A NEW ORDER WITH SAME SHIP-TO ADDRESS  
PF12 - RETURN TO MAIN MENU

7. At this point, the system has adjusted the inventory to reflect your order, modified any allocations, and stored the order on the order file.
8. From here you can:
  - Press [ENTER] to process another order with a different ship-to address
  - Press [PF2] to process another order with the same ship-to address
  - Press [PF12] to return to the SMS Order Entry Menu

## ORDERING PREMIUMS

## Promotion Order

Use this option when you wish to order items for a particular promotion.

1. When Promotion Order is selected, the Promotion Selection screen is displayed:

402 GJG175UM	SALES MATERIALS SYSTEM		01/19/93 10:50	
	PROMOTION SELECTION		ORDER NUMBER: 3019-0197	
List from: 200382			FN: 7	
Program	Type	Starting Date	Ending Date	Program Title
- 200382	PREMIUM	02/24/92	01/29/93	CAMEL B3GF FLEECE SHORTS
- 201693	COUPON	09/21/92	01/29/93	CAN GM Q4 B2 ON-CTH CPM
- 201694	PREMIUM	09/21/92	01/29/93	CAN GM Q4 B4GF TACKLE T/SH
- 201698	PREMIUM	09/21/92	01/29/93	CAN GM Q4 B3GF HUNT'C CAP
- 201719	PREMIUM	09/21/92	01/29/93	VANTAGE B3GF 1993 PLANNER - 4TH QUARTER
- 201720	PREMIUM	09/21/92	01/29/93	VANTAGE B3GF CIGARETTE CASE- 4TH QUARTER
- 201721	PREMIUM	09/21/92	01/29/93	VANTAGE B2GF CLASSIC STYLED INK PEN
- 201723	PREMIUM	09/21/92	01/29/93	VANTAGE B2GF "PACK MATE" LIGHTER-4TH QTR
- 201830	VPR	09/21/92	01/29/93	WINSTON-\$3.00/CARTON VPR 4TH QTR
- 202192	VPR	08/24/92	01/29/93	MORE4TH QTR. \$1.50/PR OPTION VPR
- 202204	VPR	08/24/92	01/29/93	VANTAGE 4TH QTR \$1.50/VPR (OPT/SALES)
- 202265	PREMIUM	08/24/92	01/29/93	MCSA-B4GF GENERIC STATE FAIR
- 202416	PREMIUM	09/21/92	01/29/93	NASA B3GF HUNTER'S ORANGE CAP
- 202528	VPR	08/31/92	01/30/93	WINSTON-NWSA CARTON BUYDOWN
- 202564	PREMIUM	09/28/92	01/29/93	NASA B1GF LS ATLANTA T-SHIRT (HOOTERS)
PF3 - PREVIOUS SCREEN    PF7 - TOP OF DATA    PF12 - MAIN MENU    PF1 - HELP				

2. To view additional pages of promotions, press [ENTER]. To return to the top of the list, press [PF7].
3. If you wish to narrow down this list to one particular type of promotion, position the cursor in the TYPE column and press [PF1] (HELP). A pop-up window will display the following options:

- C    Coupon Promotions
- P    BxGxF Promotions
- R    Premium Promotions
- V    VPR Promotions
- "    (blank) All Promotion Types

Enter the desired promotion type and press [ENTER]. The system will display only promotions for the type specified.

◆ Note: This step is optional.

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4. Select the promotion you wish to order items for and press [ENTER]. Only 1 promotion can be selected.
5. The Form/Items Order screen will be displayed, listing each of the items needed for the promotion:

[illegible]

- You may also add other items/quantities on this screen. Up to 60 items can be specified on this screen.**

7. When you are ready to continue with the order press [PF4]. The Order Review screen will be displayed.

On this screen you can modify the SKU quantity. When you are ready to continue, press [PF4].

## ORDERING PREMIUMS

8. The system now checks the inventory to determine if all of the items needed are available.

If all items *are in inventory*, the system will display the Order Completion screen. This screen provides you with your order number and cost. If you continue with the order process from this screen, the order will be generated.

9. If any of the requested items are *not currently in inventory*, a screen will be displayed which lists the items/quantities that will be placed on backorder.

402 GJ1584U1		SALES MATERIALS SYSTEM		01/19/93 10:56	
ORDER FROM: 2126		INVENTORY EXCEPTION		ORDER NUMBER: 3019-0197	
SHIP TO: 2126 / 2126XX		(LINES 1 - 1 OF 1 SHOWN)			
ITEM	DESCRIPTION	REQUESTED	AVAILABLE	BACKORDER	
390920	CAMEL BRASS LIGHTER	1	0	** 1 **	
ESTIMATED ORDER COST:		65.00	SPECIAL HANDLING COST:		
PF4 - SHIP NOW (SHIP BACKORDER WHEN AVAILABLE)    ** - DENOTES SUBSTITUTE ITEMS PF5 - SHIP NOW (CANCEL BACKORDER)                    PF6 - SPECIAL HANDLING PF9 - SUSPEND ORDER (RESERVES INVENTORY)           PF7 - SCROLL UP PF10 - HOLD UNTIL BACKORDERS ARE FILLED           PF8 - SCROLL DOWN PF11 - RESTART ORDER                                    PF12 - MAIN MENU           PF1 - HELP					

10. For each item needed, this screen indicates the quantity requested, available, and on backorder. From this screen you can:

- Press [PF4] to ship the available items and put the missing items on back order. This will process the order!
- Press [PF5] to ship the available items and cancel the items on back order. This will process the order!
- Press [PF6] to request special handling.
- Press [PF9] to suspend the order. (This will reserve inventory for your order but will not process the order.) When [PF9] is pressed, you will be prompted to enter special Sales Rep instructions (optional).

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**ORDERING PREMIUMS**

- Press [PF10] to hold the entire order until backorders are filled. When [PF10] is pressed, you will be prompted to enter special Sales Rep instructions (optional).
- Press [PF11] cancel the entire order.

11. If you need to request special handling, press [PF6].

12. To continue with the order entry process, press [PF4] or [PF5]. The system will prompt you to enter any special Sales Rep instructions. When you are ready to continue, press [ENTER]. Your order will be generated and the following message is displayed:

**YOUR ORDER ####-#### HAS BEEN SUCCESSFULLY PROCESSED.**

At this point, the system has adjusted the inventory to reflect your order, modified any allocations, and stored the order on the order file.

13. From here you can:

- Press [ENTER] to process another order with a different ship-to address
- Press [PF2] to process another order with the same ship-to address
- Press [PF12] to return to the SMS Order Entry Menu

---

**Copy Existing Order**

Use this option when you wish to copy the items/quantities on an existing order to a new order. This is a fast way to create an order when the items/quantities for the two orders are similar.

1. When this option is selected the system will prompt you to enter the number of the order you wish to copy. The order specified must be a valid SMS order number.
2. When [ENTER] is pressed the Form/Items Order screen is displayed. This screen lists the items/quantities of the "copy from" order.
3. Modify the items/quantities, as desired. You may also add new items.
4. The remainder of this process is the same as for promotion orders. Refer to steps 7-13 in the previous section for additional information.

After entering commodity numbers for all premiums and advertising by sales representative, check off items ordered on master Workplan Book as orders are placed.

Confirm orders by voice mail to affected personnel.

The SMS system has been further enhanced to allow for "bulk" ordering of items.

## Bulk Ordering

## Function 422

## Procedure

Functions 422 and 425 are now available to place orders to multiple locations.

- Function 422 is used when ordering identical quantities to multiple locations.
- Function 425 is used when ordering different quantities to multiple locations.

This function contains options for entering general shipment orders into SMS. The general shipment order is a "mass order" that is entered one time and distributed to all ship-to locations on a specified locator list.

This function should be used when the same items and quantities are to be sent to all ship-to locations on the list. If you wish to specify different items/quantities, or omit ship-to locations from the distribution, use function 425 instead.

- ◆ **Note:** This function is similar to function 402, Order Entry. If you have used that function, this process will be familiar to you.

1. Log on to SMS and invoke function 422, Gen Ship — Same Qty Batch Release. The following screen is displayed:

```

422  GJG172UN          SALES MATERIAL SYSTEM          06/21/93 10:05
                        GENERAL SHIPMENT                MASTER ORDER NBR: 3172-0014
                                                           FM:
NAME -----DESCRIPTION----- USER      NAME -----DESCRIPTION----- USER
X --P1 NASA FOR NON-MENU PROMO PL XXXXX
--P2 SASA NON-MENU PROMOTION PL XXXXX
--P3 NCSA NON-MENU PROMOTION PL XXXXX
--P4 MCSA NON-MENU PROMOTION PL XXXXX
--P5 PMSA NON-MENU PROMOTION PL XXXXX
--P6 MWSA NON-MENU PROMOTION PL XXXXX
--ABCD SSSSS                      XXXXX
--AHL TESTING LOCATOR SYSTEM      XXXXX
--AL01 S-D AHL (MSDR REQUIREMENTS XXXXX
--BOX1 SALEM BOX-1ST QTR 92 (DETR XXXXX
--CAL5 L CALLS (VA, MA, MI)      XXXXX
--CAL1 RETAIL CALL CLASS-VA, MA, XXXXX
--CAL2 RETAIL CALL CLASS-VA, MA, XXXXX

PF6 - TOP OF DATA      PF7 - SCROLL UP      PF10 - SEARCH      PF1 - HEL
PF12 - MAIN MENU        PF8 - SCROLL DOWN

```

2. Select the locator list for which you wish to generate an order and press [ENTER].
3. The order type selection screen will be displayed:

## ORDERING PREMIUMS

4

```
422 031573UN      SALES MATERIAL SYSTEM      06/21/93 11:09
LOCATORS LIST NAME: --P1  ORDER ENTRY SELECT  MASTER ORDER NBR: 3172-0017
NUMBER OF LOCATIONS: 11      PN: _____

      Select one type of order entry:
      _ CATEGORY ORDER
      _ FORM/ITEMS ORDER
      _ MODULAR BOOK ORDER
      _ PROMOTION ORDER
      _ COPY EXISTING ORDER

      OPTIONAL FUTURE DELIVERY DATE: _____ (YYMMDD format)

      PF3 - RETURN TO PREVIOUS SCREEN
      PF12 - MAIN MENU
      PF1 - HELP
```

4. At the top of the screen, the system indicates the number of orders that will be produced (number of locations on the list selected), and a master order number.

Enter X beside the type of order you wish to create:

- Category Order - Use this option when you wish to select the items to be ordered by category (such as Permanent POS, Premium, etc.).
  - Form/Items Order - Use this option when you know the item number(s) you wish to order.
  - Modular Book Order - Currently unavailable (future enhancement).
  - Promotion Order - Use this option to order items for a promotion.
  - Copy Existing Order - Use this option when the order you are creating is similar to an existing order, as some data entry can be omitted.
5. If you wish to enter an order for future delivery (instead of immediate delivery), enter the desired delivery date in the **FUTURE DELIVERY DATE** field. The date specified cannot be more than 210 days into the future, and must be entered in YYMMDD format.
6. Press [ENTER] to continue.

The steps that you must take at this point will vary, depending on the order type selected. The next section contains a summary of this process for using any of the

## Summary of Process

order types. It is followed by detailed instructions for creating a Form/Items order. Refer to the section on function 402 for additional information on the other order types.

1. At the order type selection screen, select the desired order type. If you wish to request a future delivery date, enter the desired date. The date cannot be more than 210 days into the future. It must be entered in YYMMDD format.
2. Press [ENTER] to continue.
  - *If you have requested a Category order:*
    - The system will prompt you to select a major category. For each major category selected, you must select at least one intermediate and minor category. Up to 4 major categories can be selected; up to 6 intermediate categories can be selected for each major category; up to 20 minor categories can be selected for each intermediate category.
    - When category selections are complete, the system lists the associated items. Enter the desired quantity of each item and press [PF4].
  - *If you have requested a Form/Items order:*
    - The system will prompt you to enter each item and the desired quantity. Enter the desired items/quantities and press [PF4].
  - *If you have requested a Promotion order:*
    - To view a specific type of promotion, position the cursor in the TYPE column and press [PF1] (HELP). Select the type of promotion you wish to view. (This step is optional.)
    - Select the promotion for which you wish to order items.
    - The system will then list the items associated with the promotion. Enter quantities for the desired items and press [PF4].
  - *If you are copying an existing order:*
    - The system will prompt you to enter the existing order number you wish to copy items and quantities from.
    - The system will then list the items/quantities associated with the specified order. Enter/modify items/quantities for the new order you are creating and press [PF4].
3. When the previous step is complete for the type of order selected, the Order Review screen is displayed. You can modify the quantities on this screen but cannot add items. Press [PF4] to continue.

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### Form/Items Order

## ORDERING PREMIUMS

```

422 GJG174U2          SALES MATERIAL SYSTEM          06/21/93 12:51
LOCATORS LIST NAME: --P1 INVENTORY EXCEPTION MASTER ORDER NBR: 3172-0018
NUMBER OF LOCATIONS: 11

(LINES 1 - 1 OF 1 SHOWN)
ITEM DESCRIPTION----- PER TOTAL TOTAL ON
232 ENV. NO. 12 ADD-RJR 3 33 0
(Available quantity subject to change)

ESTIMATED ORDER COST: 787.93 SPECIAL HANDLING COST:

PF3 - RETURN TO PREVIOUS SCREEN PF7 - SCROLL UP
PF4 - COMPLETE ORDER PF8 - SCROLL DOWN
PF6 - SPECIAL HANDLING PF12 - MAIN MENU (ABORT ORDER) PF1 - HELP

```

4. This screen lists the items requested, the number of each item per order, and the total number requested for all ship-to locations.

**WARNING:** This is the point of no return! If you go forward from here, an order will be generated!

5. From this screen you can:
- Press [PF4] to complete the order
  - Press [PF6] to request special handling of the order
  - Press [PF12] to cancel the order
6. If you wish to complete the order, press [PF4]. You will be prompted to enter special instructions. This entry is optional. If you do enter special instructions, they will apply to all ship-to locations on the locator list.
7. When special handling instructions have been entered or skipped, press [ENTER] to continue. The order is generated and the following confirmation screen is displayed:

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422 CJC174U2 .                      SALES MATERIAL SYSTEM                      06/21/93 13:11  
GENERAL SHIPMENT                      MASTER ORDER NBR: 3172-0018  
FW: \_\_\_\_\_

LOCATION LIST NAME: --P1

YOUR GENERAL SHIPMENT ORDERS WILL BE PROCESSED TONIGHT

ESTIMATED ORDER COST :                      787.93

SPECIAL HANDLING COST:

---

PRESS ENTER TO RETURN TO THE MAIN MENU

8. This screen confirms that your order will be processed. To return to the SMS Order Entry Menu, press [ENTER].

This function contains options for entering general shipment orders into SMS. This function is similar to 422, which is also for entering general shipment orders. However, function 425 allows you to specify different items/quantities, for the various ship-to locations on the locator list. You may also omit ship-to locations from the distribution.

**Note:** If you are entering the same items/quantities for all ship-to locations in a locators list, use function 422 instead as it will be faster.

1. Log on to SMS and invoke function 425, Gen Ship — Different Quantities. The following screen is displayed:

### Function 425

## Procedure

## ORDERING PREMIUMS

```

422  GJG172UN          SALES MATERIAL SYSTEM          06/21/93 10:05
                        GENERAL SHIPMENT                MASTER ORDER NBR: 3172-0014
                                                PM: _____

NAME -----DESCRIPTION----- USER      NAME -----DESCRIPTION----- USER
X --P1 NASA FOR NON-MENU PROMO PL XXXX      --P1 NASA FOR NON-MENU PROMO PL XXXX
--P2 NASA NON-MENU PROMOTION PL XXXX        --P2 NASA NON-MENU PROMOTION PL XXXX
--P3 NCSA NON-MENU PROMOTION PL XXXX        --P3 NCSA NON-MENU PROMOTION PL XXXX
--P4 NCSA NON-MENU PROMOTION PL XXXX        --P4 NCSA NON-MENU PROMOTION PL XXXX
--P5 NMSA NON-MENU PROMOTION PL XXXX        --P5 NMSA NON-MENU PROMOTION PL XXXX
--P6 NMSA NON-MENU PROMOTION PL XXXX        --P6 NMSA NON-MENU PROMOTION PL XXXX
ABCD SSSSS                                  ABCD SSSSS
AHL TESTING LOCATOR SYSTEM                  AHL TESTING LOCATOR SYSTEM
AL01 S-D AHL (HDSR REQUIREMENTS) XXXX      AL01 S-D AHL (HDSR REQUIREMENTS) XXXX
BOX1 SALEM BOX-1ST QTR 92 (DETR) XXXX      BOX1 SALEM BOX-1ST QTR 92 (DETR) XXXX
CAL3 L CALLS IVA, MA, MI) XXXX             CAL3 L CALLS IVA, MA, MI) XXXX
CAL1 RETAIL CALL CLASS-VA, MA, XXXX         CAL1 RETAIL CALL CLASS-VA, MA, XXXX
CAL2 RETAIL CALL CLASS-VA, MA, XXXX         CAL2 RETAIL CALL CLASS-VA, MA, XXXX

PF6 - TOP OF DATA      PF7 - SCROLL UP      PF10 - SEARCH      PF1 - HEL
PF12 - MAIN MENU        PF9 - SCROLL DOWN

```

2. Select the locator list for which you wish to generate an order and press [ENTER].
3. The following screen is displayed:

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## ORDERING PREMIUMS

```

425 GJG180U3          SALES MATERIAL SYSTEM          06/21/93 10:26
                      GENERAL SHIPMENT              MASTER ORDER NBR: 3172-0015
                                                         FM: _____

RESTART A PREVIOUS ORDER WITH MASTER ORDER NUMBER: _____ (OPTIONAL)
(This restarts the previous order at the last address used)

Enter new priorities for areas if desired (1-9)
-----
| AREAS (NATIONALLY) : | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
| SHIPPING PRIORITIES: | 9 | 9 | 9 | 9 | 9 | 9 | 9 | 9 | 9 |
-----
                      (Default = '9')

PRESS ENTER TO CONTINUE
-----
PF3 - RETURN TO PREVIOUS SCREEN
PF12 - MAIN MENU
  
```

4. Most of the time, you will press [ENTER] to bypass this screen. However, there are 2 instances in which it is useful.

- If you had previously started the order entry process but were interrupted before completing the order, you can pick up where you left off. Simply enter the **MASTER ORDER NUMBER** in the space provided and press [ENTER]. The system will automatically begin the order entry process for the next location in the locator list.
- This screen may also be used to specify one or more high priority ship-to areas. This is useful if inventory is low and it is critical that an area receive its shipment, or when the transit time to one area is longer than the others.

To specify a priority, enter a number between 1 and 9, with 9 being lowest priority and 1 being highest.

5. When [ENTER] is pressed, the order type selection screen is displayed:

## ORDERING PREMIUMS

```

425 GJG184UM          SALES MATERIAL SYSTEM          06/21/93 10:31
                        ORDER ENTRY SELECT          MASTER ORDER NBR: 3172-0015
                                                PW: _____

Select one type of order entry:

- FORM/ITEMS ORDER
- PROMOTION ORDER
- COPY EXISTING ORDER

-----
PF9 - ABANDON WITHOUT RESTART          PF1 - HELP
PF12 - MAIN MENU (RESTART ALLOWED)
  
```

## 6. Enter X beside the type of order you wish to create:

- Form/Items Order - Use this option when you know the item number(s) you wish to order.
- Promotion Order - Use this option to order items for a promotion.
- Copy Existing Order - Use this option when the order you are creating is similar to an existing order, as some data entry can be omitted.

## 7. When an order type has been selected, press [ENTER] to continue.

The steps that you must take at this point will vary, depending on the order type selected. The next section contains detailed instructions for creating a Form/Items order. Refer to the section on function 402 for additional information on the other order type.

*Note:* Throughout this process, the following exit options are available:

- Press [PF9] to exit and abandon the order (you will not be able to restart the order at a later point in time).
- Press [F12] to exit and save the order (you will be able to restart the order at a later point in time).

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## ORDERING PREMIUMS

## Form/Items Order

Use this option when you know the item numbers of the items you wish to order. It allows you to enter the item numbers/quantities directly.

1. When Form/Items Order is selected, the system displays ship-to information for the first location in the locators list:

```

425  GJG181U1          SALES MATERIAL SYSTEM          06/21/93 10:32
                           ADDRESS SCREEN          MASTER ORDER NBR: 3172-0013
                                                FM: _____

ORDERING OFFICE: XXXX
.....
SHIP TO: ACCOUNT NUMBER: .....
        DIVISION OFFICE: 1XXX
        TERRITORY: .....
SHIP TO ADDRESS:  E.M. MCATEE
                  300 BERNYM PARK
                  SUITE 111
                  BERNYM PA 19312 0000

        OPTIONAL FUTURE DELIVERY DATE        (YYMMDD format)

-----
ENTER - CONTINUE WITH ORDER          PF12 - MAIN MENU (RESTART ALLOWED)
PF5   - SKIP THIS ADDRESS
PF9   - ABANDON WITH NO RESTART CAPABILITY          PF1 - HELP
  
```

2. If you *do not* wish to enter an order for this location, press [PF3] to skip this address and proceed to the next.

If you *do* wish to enter an order for this location, you may specify a future delivery date if one is desired. To do so, enter the desired delivery date in the **FUTURE DELIVERY DATE** field. The date specified cannot be more than 210 days into the future, and must be entered in YYMMDD format.

3. When you are ready to continue, press [ENTER]. The system will allow you to specify the items/quantities to be ordered for this location:

[illegible]

4. Enter the item number and quantity of each item you wish to order. Up to 60 different items can be specified.
5. Press [PF4] to continue. The following screen is displayed:

```

425  GJ1584UN          SALES MATERIAL SYSTEM          06/21/93 10:38
                        ORDER REVIEW                     MASTER ORDER NBR: 3172-0015

SKU  (LINES 1 - 1 OF 1 SHOWN)
QTY  ITEM DESCRIPTION----- UNITS/SKU
3    232 ENV. NO. 12 ADD-RJR OR    500 BOX

MAXIMUM ORIGINAL  L  REMAIN
ORDER  ALLOC  E  ALLOC
QTY    QTY  V  QTY
2      0      0      0

```

---

```

PF3 - RETURN TO PREVIOUS SCREEN  PF7 - SCROLL UP
PF4 - CONTINUE WITH ORDER        PF8 - SCROLL DOWN
PF12 - MAIN MENU
                                     PF1 - HELP

```

- 6. This screen lists the items/quantities requested.**

**WARNING:** This is the point of no return! If you go forward from here, an order will be generated for this ship-to location!

7. From this screen you can:
  - Press [PF4] to complete the order
  - Press [PF12] to cancel the order
8. If you wish to complete the order, press [PF4]. You will be prompted to enter special handling instructions for this ship-to location. This entry is optional.
9. When special handling instructions have been entered or skipped, press [ENTER] to continue. The order is generated and the following confirmation screen is displayed:

## ORDERING PREMIUMS

```

425 GJ1578U1          SALES MATERIAL SYSTEM          06/21/93 10:40
                      ORDER ENTRY COMPLETED          ORDER NUMBER: 3172-0016
                                                         FN:

```

YOUR ORDER: 3172-0016 HAS BEEN SUCCESSFULLY PROCESSED.

ESTIMATED ORDER COST :            71.63

SPECIAL HANDLING COST:

---

```

ENTER - PROCESS A NEW ORDER WITH NEXT SHIP-TO ADDRESS
PF2 - PROCESS A NEW ORDER WITH SAME SHIP-TO ADDRESS
PF12 - RETURN TO MAIN MENU

```

PF1 - HELP

10. This screen confirms that your order will be processed. From this screen you can:

- Process a new order with the *next* ship-to address in the locator list
- Process a new order for the *same* ship-to address
- Return to the SMS Order Entry Menu

11. When either of the "Process new order" options are selected, the system returns to the ship-to screen and begins this process over again.

12. Repeat this process as many times as necessary to generate orders for other ship-to locations in the locator list.

These two functions will greatly expedite the processing of orders for the Operations Unit.

To properly use the bulk-order functions, the PRC must customize lists of locations which can be pulled to send orders to. Suggested and commonly used lists include:

- Each Division's sales reps ship-to locations
- Each Division's sales reps home addresses
- Each Region's Direct Account locations
- Each Region's Division Office locations

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## ORDERING PREMIUMS

## Function 555

## Procedure

Following are instructions relative to setting up these customized shipment lists.

This function is used to build a locator list for general shipment ordering.

1. Log on to SMS and invoke function 555, Define Locator List. The following screen will be displayed:

```
555  GJC555UN          SALES MATERIAL SYSTEM          05/12/93 15:19
                        GENERAL SHIPMENT LOCATOR MENU      FM:
GENERAL SHIPMENT KEY (LOCATOR): _____ (BLANK FOR LIST OF LOCATORS)

MAINTENANCE:  -  ADD LOCATOR
                -  DELETE LOCATOR
                -  CHANGE ENTRIES IN LOCATOR
                -  DELETE ENTRIES IN LOCATOR (BATCH)
                -  DISPLAY ENTRIES IN LOCATOR
                -  DISPLAY INVALID ENTRIES IN LOCATOR
                -  VIEW CREATION CRITERIA OF LOCATOR

UTILITIES:    -  MERGE LOCATOR LIST
                -  MERGE LOCATOR LIST (BATCH)
                -  PRINT LOCATOR LIST (BATCH)

* NOTE * THE BATCH OPTIONS ARE RECOMMENDED FOR USE WHENEVER POSSIBLE
Enter=PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
      Help                                         Main
```

2. From this screen you can:

- add a locator list
- view, change, or delete a locator list
- view criteria used to create a locator list
- view invalid entries in a locator list
- merge or print a locator list

The delete entries and merge/print functions can be performed online or in batch. Batch options are recommended when there are many entries in the list.

3. To use this function, enter the 4-character locator code for the list you wish to add or maintain and select the desired maintenance option.

If you do not know the locator ID, select the maintenance function you wish to use press [ENTER]. A locator list selection screen is displayed:

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## ORDERING PREMIUMS

```

$$$ GJC555U9          SALES MATERIAL SYSTEM          06/08/93 09:12
                      GENERAL SHIPMENT LOCATOR LIST          FN:
NAME-----DESCRIPTION-----USER      NAME-----DESCRIPTION-----USER
--P1 KASA FOR NON-MENU PROMO PL XXXXX   CHIC SALEM BOX 1ST QTR 92 (CHIC XXXXX
--P2 KASA NON-MENU PROMOTION PL XXXXX   C493 KCSA APRIL '93 OPPORT. W/P XXXXX
--P3 KCSA NON-MENU PROMOTION PL XXXXX   C593 KCSA MAY '93 OPPORT. W/P/A XXXXX
--P4 KCSA NON-MENU PROMOTION PL XXXXX   C693 KCSA JUNE '93 OPPORT. W/P/L XXXXX
--P5 KMSA NON-MENU PROMOTION PL XXXXX   C793 KCSA JULY '93 OPPORT. W/P XXXXX
--P6 KMSA NON-MENU PROMOTION PL XXXXX   C893 KCSA AUGUST '93 OPPORT. W/P XXXXX
--ABCD $$$$$$                      C993 KCSA SEPT. '93 OPPORT. W/P XXXXX
--AHL TESTING LOCATOR SYSTEM XXXXX      DELE DELETE LOCATOR TEST XXXXX
--AL01 9-D AHL (MSR REQUIREMENTS XXXXX   DSW1 SHELF TEMPLATE - #405429 XXXXX
--BOX1 SALEM BOX-1ST QTR 92 (DETR XXXXX   DULM DULUTH WAREHOUSE ADDRESSES 63XX
--CAL5 L CALLS (VA, MA, MI) XXXXX      ESSL ESS LEASE & APNDX.A PAY AG XXXXX
--CAL1 RETAIL CALL CLASS-VA, MA, XXXXX   FNEC FM ECD PROGRAM XXXXX 3740
--CAL2 RETAIL CALL CLASS-VA, MA, XXXXX   GNM RELOCATION KIT #4 XXXXX
--CAL3 RETAIL CALL CLASS-VA, MA, XXXXX   GNM1 RELOCATION KIT #1 XXXXX
--CAL4 RETAIL CALL CLASS-VA, MA, XXXXX   GMS MARSH SUPER STUDY DIV/DIST XXXXX

SELECT LIST TO DELETE BY PLACING AN 'X' NEXT TO NAME
Enter--PF1--PF2--PF3--PF4--PF5--PF6--PF7--PF8--PF9--PF10--PF11--PF12--
      Help      Retn      Top      Blvd Frwd      Brch      Main

```

4. Select the desired locator list and press [ENTER].
5. The remainder of this chapter discusses each option in more detail.

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**ORDERING PREMIUMS****Add Locator**

This option is used to add a new general shipment list.

1. Enter a unique 4-character code to identify your list in the **LOCATOR** field. Enter **X** beside the **ADD** option and press **[ENTER]**.
2. The following screen will be displayed:

```

555 GJG55502          SALES MATERIALS SYSTEM          02/23/93 12:41
                        ADD GENERAL SHIPMENT LOCATOR

GENERAL SHIPMENT KEY: KAB1  DESCRIPTION: _____

                        LIST ('L')
                        OR USE ('X')

ONLY AREAS..... FROM: 1          THROUGH: 9
ONLY REGIONS..... FROM: 11         THROUGH: 99
ONLY DIVISIONS..... FROM: 1101      THROUGH: 9999 CHAIN DIV (Y/N): N
ONLY CHAIN DIVISIONS.. FROM: 1101    THROUGH: 9999
ONLY TERRITORIES..... FROM: 110101   THROUGH: 999999
ONLY CHAIN ACCOUNTS... ACCT: _____ SALES LEVEL: XXXX
* ONLY SIS ACCOUNTS....
ONLY OTHER LOCATIONS.. ('L' - LIST ONLY)

'L' - LIST REQUESTED ENTRIES TO SELECT FOR YOUR LOCATOR LIST
'X' - AUTOMATICALLY ADD ALL REQUESTED ENTRIES TO LOCATOR LIST
'M' - MANUALLY ADD ENTRIES TO LOCATOR LIST (OPTION ONLY FOR SIS ACCOUNTS)
Enter--PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
      HELP      RETRN
  
```

3. This screen contains several options for specifying the accounts to be included in the locator list. Accounts can be specified by:

- Area
- Region
- Division
- Chain Division
- Territory
- Chain account
- SIS accounts
- Other locations

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4. For each of the first 6 options, a range can be specified to narrow down the list.
5. In addition, each option can be marked with an X or L. When the option is marked with an L, the system will list those Areas, Regions, Divisions, etc. that fall into the range specified (or all if no range is specified). You can then select the ones you wish to include in the locator.

If the option is marked with an X, the system automatically includes all Areas, Regions, etc., in the range (if any) in the locator.

The SIS Accounts option can also be marked with an M. When this method is used, you can manually enter the desired accounts.

6. To create a locator, enter a description of your new list in the **DESCRIPTION** field, then select the desired option. Remember to use an L if you wish to view a list of accounts. You may also specify a range.

For demonstration purposes, we will mark the Division option with an L and enter a range of 2100 to 2126. When this method is used, a screen similar to the following is displayed:

```

SSS GJG561U1          SALES MATERIALS SYSTEM          02/23/93 13:10
                      GENERAL SHIPMENT LOCATOR

KEY: KAS1 - TEST          LIST DIVISIONS FROM 2100XX - 2126XX

      NUMBER ----- NAME -----
      2124XX 2124 RALEIGH DIVISION
      2126XX 2126 WINSTON SALEM DIVISION

PLEASE SELECT ENTRIES TO ADD TO THIS LOCATOR LIST
Enter--PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
      HELP          ADD          Top  BKWRD  FRWRD  Cncl
  
```

7. If we had selected an area or Region instead, this screen would list Areas/Regions that match any criteria specified.
8. If this screen is full, press [FRWRD]/[BKWRD] to scroll through the list. Press

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[TOP] to return to the top of the list.

9. Enter X to select the entries you wish to add to the locator list and press [ADD].

(If you do not wish to create the locator list, press [CANCL] to exit.)

10. The following window will be displayed:

```

555 GJ056101          SALES MATERIALS SYSTEM          02/23/93 13:14
                      GENERAL SHIPMENT LOCATOR

KEY: KABL - TEST          LIST DIVISIONS FROM 2100XX - 2126XX

NUMBER -----NAME-----
2124XX 2124 RALEIGH DIVISION

ALL ENTRIES HAVE BEEN SUCCESSFULLY APPLIED.
NUMBER OF ENTRIES IN LIST:      1
THE ADDRESS LIST IS NOW READY TO BE USED FOR ORDERS.
** PRESS ENTER TO CONTINUE **

PLEASE SELECT ENTRIES TO ADD TO THIS LOCATOR LIST
Enter--PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
      HELP      ADD      Top  BKWD FWRD Cancl

```

11. You can now use the locator you have created for orders. Press [ENTER] to return to the Locator Menu screen.

## Delete Locator

This option is used to delete an existing locator list.

1. Enter the locator code for the list you wish to delete. Enter X beside the DELETE option and press [ENTER].

♦ *Note:* If you do not know the locator code, mark the DELETE option and press [ENTER] to select the locator list.

2. The following window will be displayed:

```

555 GJGSSUN          SALES MATERIALS SYSTEM          02/23/93 15:24
                      GENERAL SHIPMENT LOCATOR MENU      PM:
GENERAL SHIPMENT KEY (LOCATOR): KAB1      (BLANK FOR LIST OF LOCATORS)

MAINTEN  +-----CONFIRM DELETE-----+
          |KAB1 WILL BE DELETED|
          |TO CANCEL: PRESS PF3|
          |TO DELETE: PRESS ENTER|
          +-----+
          UTILITY:  _ MERGE LOCATOR LISTS

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
      HELP                                     MAIN
  
```

3. If you wish to delete the list, press [ENTER]; otherwise press PF3 to cancel.
4. If you have pressed [ENTER] to delete the list, the message, Deleted Successfully, will be displayed. Press [ENTER] to return to the General Shipment Locator Menu.

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## Change Locator

This option is used to change an existing locator list.

1. Enter the locator code for the list you wish to change. Enter X beside the **CHANGE** option and press [ENTER].

♦ *Note:* If you do not know the locator code, mark the **CHANGE** option and press [ENTER] to select the locator list.

2. A screen similar to the following will be displayed:

```

*** PLEASE PRESS PF11 TO UPDATE LIST AND RETURN TO MENU ***
555 GJG55505          SALES MATERIALS SYSTEM          02/23/93 14:22
                      GENERAL SHIPMENT LOCATOR LIST UPDATE

KEY  KABL TEST
SETUP 2000 02/23/93 SHARON S KORCEYK
      REGULAR CREATION BY ADDING
ACTION  SIS
(A,D)  ARDT RTE CC ACCOUNT NAME INVALID DATA
      2124XX          2126 WINSTON SALEM DIVISION
      _____
      _____
      _____
      _____
      _____
      _____
      _____
      _____
      _____
      _____

CAUTION - INVALID DATA (SHOWN IN RED) SHOULD BE CORRECTED BEFORE USING LIST
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
      HELP Chain Area Reg Div Terr BKWRD FRWRD Other SIS Exit
  
```

3. If this screen is full, press [FRWRD]/[BKWRD] to scroll through the list.
4. From this screen you can:
  - Enter **A** in the **ACTION** column to add a new line item (Area, Region, Division, Territory, or SIS account). You must also specify the item to be added.
  - Enter **D** in the **ACTION** column to delete an existing line item.

5. You may also add to this locator list by using the PF keys at the bottom of the screen. For example, you can add accounts for a chain, as well as Areas, Regions, Divisions, Territories, locations, or SIS accounts.
6. When the Area, Region, Division or Territory PF keys are pressed, the system will prompt you for a range, and then display a selection list (of Areas, Regions, Divisions, or Territories) based on your response:

[illegible]

7. Select those you wish to add to the locator list and press [ADD], or press [CANCEL] to cancel.

## ORDERING PREMIUMS

8. When the chain PF key is pressed, the system will prompt you for a **CHAIN NAME** and **SALES LEVEL**, and then display a selection list of chains based on your responses:

```

535 5555-03          SALES MATERIALS SYSTEM          02/23/93 14:40
                      CHAIN MASTER LOOKUP

-CHAIN ID-  -NAME-  -ADDRESS-  -CITY-  -ST-  -DIV-
- 0502 00 00 FOOD LION      P. O. BOX 1330    SALISBURY    NC 2142
- 2732 00 00 FOODLAND      MIDDLETOWN MALL  FAIRMONT    WV 2613
- 5245 00 00 FOODLAND      407 W. HURON     MISSOURI VALLEY IA 5050
- 5555 00 00 FOODLAND      407 W. HURON     MISSOURI VALLEY IA 5050
- 5061 00 00 FOODLAND OF CHAS. IN 3443 A RIVERS AVE. CHARLESTON  SC 2934
- 1915 00 00 FOODLAND MARKETS 741 EAST BARTON  FRESNO      CA 9422
- 2147 00 00 FOODLAND MARKETS ATTN: JACK MCENNA HUNTINGTON  WV 2613
- 1836 00 00 FOODLAND, INC.  9201 JENSON      HOUSTON      TX 77059
- 1349 00 00 FOODLAND SUPER MKT 3536 HARDING AVE. HONOLULU    HI 96813
- 2278 00 00 FOODLAND STORES  ATTN: STEVE MEADOWS FAYETTEVILLE WV 25716
- 4997 00 00 FOODLINER IGA    1014 RICHLANDS HWY JACKSONVILLE NC 27134

Enter--PF1--PF2--PF3--PF4--PF5--PF6--PF7--PF8--PF9--PF10--PF11--PF12--
      HELP                                Top  BKWD FWRD

```

9. Select the chain for which you wish to view accounts and press [ENTER]. The following screen will be displayed:

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## ORDERING PREMIUMS

```

555 8555-03          SALES MATERIALS SYSTEM          02/23/93 14:40
                      CHAIN MASTER LOOKUP
                      -ACCOUNTS-
-CHAIN ID-
X 0502 00 00
- 2732 00 00
- 3245 00 00
- 5555 00 00
- 5061 00 00
- 1915 00 00
- 2147 00 00
- 1836 00 00
- 1349 00 00
- 2278 00 00
- 4097 00 00

ACCOUNT: 0502-0000 FOOD LION          SALES LVL: XXXXXX
                                     SIS
                                     ACCOUNT
      ARDT      NAME
- 132721 FOOD LION #585          796814
- 132721 FOOD LION #879          355306
- 132721 FOOD LION #875          381937
- 132721 FOOD LION #1206        477658
- 132721 FOOD LION #960          439218
- 132722 FOOD LION #488          841187
- 212401 FOOD LION #54           800225
- 212401 FOOD LION #757         306087
- 212401 FOOD LION #586         733171
- 212401 FOOD LION #76          799632

PLEASE SELECT ACCOUNT WITH AN 'X'
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---
HELP          Cancl ADD
  
```

10. This screen displays the accounts associated with the chain-ID selected. Enter X beside the accounts you wish to add to your locator list, then press [ADD] ( or press [CANCL] to cancel).
11. When you are ready to exit, press [RETRN].

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## ORDERING PREMIUMS

- 12. When the SIS PF key is pressed, the system will prompt you to specify criteria for the accounts you wish to add:**

```

555 GJG555US                SALES MATERIALS SYSTEM                02/23/93 14:46
                        GENERAL SHIPMENT LOCATOR LIST UPDATE

KEY      KABI TEST
SETUP XXXX 02/23/
REGULAR CRZ

ACTION    AREAS..... FROM 1          THROUGH 9          INVALID
(A,D) ARDT RTE REGION..... FROM 11         THROUGH 99        DATA
- 2126XX DIVISION... FROM 1101       THROUGH 9999
- TERRITORIES: FROM 110101     THROUGH 999999

BY CALL CLASSIFICATION: BLANK FOR ALL
- A01 - A02 - A03 - A04 - A06 - A13
- B02 - B03 - B04 - B06 - B13 - C04
- C06 - C13 - D13 - D32 - E02 - E04
- E06 - R01 - R02 - R03 - R04 - R06
- K13 - M01 - M02 - M04 - M13 - M52
- N99 - T52

CAUTION - INVALID DATA (SHOWN IN RED) SHOULD BE CORRECTED BEFORE USING LIST

```

13. Enter criteria for the SIS account list you wish to view and press [ENTER]. A screen similar to the following will be displayed:

## ORDERING PREMIUMS

```

555 GJG55555      SALES MATERIALS SYSTEM      02/23/93 14:46
                     GENERAL SHIPMENT LOCATOR LIST UPDATE

KEY  KABL TEST
SE  -----SIS ACCOUNTS-----

AC  110101 - 599999  VALID
(A)                                     DATA

- TERR RTE ACCT CC NAME ADDRESS CITY
- 112201 001 100323 B04 EMERY'S REDWHL PORTLAND 5 FRYEBURG
- 112201 003 087484 A04 BIG APPLE #106 MAIN STREE FRYEBURG
- 112201 010 100319 C04 WALLY'S GENERAL RT 3 BROWNFIELD
- 112201 015 537981 C04 JIMBOB'S " ROUTE 117 DENMARK
- 112201 020 100318 C13 FOUR CORNERS ST RT 113 HIRAH
- 112201 025 770966 C13 WHISTLE STOP ST ROUTE 113 EAST BALDWIN
- 112201 030 100316 C04 STEEP FALLS GRO RT 113 STEEP FALLS
- 112201 035 719506 B04 R/S VARIETY ROUTE 25, LININGTON
- 112201 043 409622 C04 R/S CITGO ROUTE 25 LININGTON
- 112201 045 100303 C13 JONGERDEN'S CTR RT 25 LININGTON
- 112201 050 100304 C13 HASOW VARIETY RT 25 CORNISH
- 112201 055 754649 A02 TRIPP'S MOBIL RT 25 CORNISH
- 112201 060 274786 B04 STEVE'S VARIETY MAPLE STRE CORNISH

C  ENTER--PF1--PF2--PF3--PF4--PF5--PF6--PF7--PF8--PF9--PF10-- 1ST
    HELP          CANCL ADD
  
```

14. This screen lists accounts associated with the parameters specified on the previous screen. Enter X beside the accounts you wish to add to your locator list, then press [ADD] (or press [CANCL] to cancel).
15. When you are ready to exit, press [RETRN].
16. At the Locator List Update screen, press [EXIT] to return to the General Shipment Locator Menu.

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## ORDERING PREMIUMS

Delete Entries in  
Locator (Batch)

This option is used to remove one or more entries from a locator list.

1. Enter the locator code for the list you wish to delete entries from and enter an X beside the **DELETE ENTRIES** option; press [ENTER].

♦ *Note:* If you do not know the locator code, mark the **DELETE ENTRIES** option and press [ENTER] to select the locator list.

2. A screen similar to the following will be displayed:

SSS GJG555UC      SALES MATERIAL SYSTEM      06/08/93 09:26  
DELETE LOCATOR LIST BATCH      PW: \_\_\_\_\_

LIST...1 CAL1 RETAIL CALL CLASS-VA, MA, MI

\* DELETE: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

\*NOTE: LIST THE ENTRIES TO BE DELETED FROM THE LIST. FOR SIS ACCOUNTS  
 ENTER THE SIS ACCOUNT NUMBER.

Enter--PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---  
 Help Quit Retrn Enter Skvrd Frwrd SUBMT VIEW Main

3. Enter the entries to be deleted from the list. For SIS accounts, enter the SIS account number.
4. When all entries to be removed from the list have been entered, press [SUBMIT]. The following pop-up window is displayed:

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## ORDERING PREMIUMS

```

$$$ GJG555UC          SALES MATERIALS SYSTEM          06/08/93 10:45
                      DELETE LOCATOR LIST BATCH          PM:

LIST...: C493 MCSA APRIL '93 OPPORT. W/PLAN

* DELETE: 6930xx

Enter chgs: Press ENTER to Submit
Print parameters for user: WAGSW

Name.....:
Area (ie. P10):      Copies: 1
Class.....: 0
Printer.....: R000

Hold Print?..: Y (Y/N)
               ( PF3 will cancel )

FROM THE LIST. FOR SIS ACCOUNTS

PF7---PF8---PF9---PF10---PF11---PF12---
HELP QUIT RETN  ENTER  BKWD FWRD SUBMT  VIEW MAIN

```

5. This window indicates where the report will be printed and whose name will appear on the cover sheet.

Review the **NAME**, **AREA**, **PRINTER** and **COPIES** indicated. If you wish to change them, you may do so. If these fields do not contain entries, they must be specified.

Also, make sure the **HOLD PRINT** option is set to **N**. Otherwise, the report will only be available online.

6. Press [ENTER] to submit the report request, or [PF3] to cancel.

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## ORDERING PREMIUMS

## Display Locator

This option is used to view an existing locator list.

1. Enter the locator code for the list you wish to view. Enter X beside the **DISPLAY** option and press [ENTER].

◆ *Note:* If you do not know the locator code, mark the **DISPLAY** option and press [ENTER] to select the locator list.

2. A screen similar to the following will be displayed:

```

555 GJG55503          SALES MATERIALS SYSTEM          02/23/93 14:10
                        DISPLAY GENERAL SHIPMENT LOCATOR LIST
KEY  KAS1 - TEST          NUMBER OF ENTRIES: 1
SETUP XXXX 02/23/93 REGULAR CREATION BY ADDING
      BY SHARON S WORCEYK
      ARDT  RTE  CC  SIS ACCT  -----NAME----- INVALID
      2126XX          2126 WINSTON SALEM DIVISION      DATA

CAUTION - INVALID DATA (SHOWN IN RED) SHOULD BE CORRECTED BEFORE USING LIST
Enter-PP1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
      HELP      RETRN      Top  BKWRD FWRD      MAIN
  
```

3. If this screen is full, press [FRWRD]/[BKWRD] to scroll through the list. Press [TOP] to return to the top of the list.
4. When you are ready to exit, press [RETRN].

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## Display Invalid Entries In Locator

This option is used to view invalid entries in a locator list. Invalid entries can occur when an invalid address exists in the master list.

1. Enter the locator code for which you wish to view invalid entries. Enter X beside the **DISPLAY INVALID ENTRIES** option and press [ENTER].

♦ **Note:** If you do not know the locator code, mark the **DISPLAY INVALID ENTRIES** option and press [ENTER] to select the locator list.

2. A screen similar to the following will be displayed:

```

555 GJGSSSVB      SALES MATERIAL SYSTEM      05/12/93 15:52
                  DISPLAY GENERAL SHIPMENT LOCATOR LIST      FN:
KEY  KABL - KAB TEST      NUMBER OF ENTRIES: 37
SETUP XXXX 05/12/93 REGULAR CREATION BY ADDING
      BY SHARON S KORCZYK
      ARDT RTE CC SIS ACCT
64XXXX 64 REGION PRIOR TO REALIGNMENT      ADDR 1
65XXXX 65 REGION PRIOR TO REALIGNMENT      ADDR 1
71XXXX 71XX NATIONAL PROMOTION PLANNING REGION ADDR 1
72XXXX 72XX NATIONAL CSS MISCELLANEOUS REGION ADDR 1
82XXXX 82 SALES ADMINISTRATION ANALYSTS      ADDR 1

CAUTION - INVALID DATA (SHOWN IN RED) SHOULD BE CORRECTED BEFORE USING LIST
Enter--PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
      Help      Retrtn      Top      Skrd Fwrd      Main
  
```

3. Invalid information is displayed in the right-most column. This information is red on color terminals.
4. This function is only used to *display* invalid information. To remove invalid information, you must use the **PRINT LOCATOR LIST** function.
5. When you are ready to exit, press [RETRN]. Refer to the section on the **PRINT LOCATOR LIST** function for instructions on deleting invalid information.

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## ORDERING PREMIUMS

View Creation  
Criteria of Locator

This option is used to view the criteria used to build a locator list.

1. Enter the locator code for which you wish to view creation criteria. Enter X beside the **VIEW** option and press [ENTER].

◆ *Note:* If you do not know the locator code, mark the **VIEW** option and press [ENTER] to select the locator list.

2. A screen similar to the following will be displayed:

```

555 GJG555UA          SALES MATERIALS SYSTEM          02/23/93 15:02
                      GENERAL SHIPMENT LOCATOR VIEW CREATION      TN:
KEY.....: KAS1 - TEST
SET UP.: XXXX 02/23/93 REGULAR CREATION BY ADDING
BY: SHARON S KORCEYK
CHANGED: XXXX 02/23/93 BY: SHARON S KORCEYK
                      LIST ('L')
                      OR USE ('X')
ONLY AREAS.....: FROM:          THROUGH:
ONLY REGIONS.....: FROM:          THROUGH:
ONLY DIVISIONS.....: FROM:          THROUGH:
ONLY CHAIN DIVISIONS.....: FROM:          THROUGH:
ONLY TERRITORIES.....: FROM:          THROUGH:
ONLY CHAIN ACCOUNTS.....: ACCT:          THROUGH:
                      SALES LEVEL:
ONLY SIS ACCOUNTS.....: FROM:          THROUGH:
CALLS
ONLY OTHER LOCATIONS.....: ('L') - LIST ONLY
Enter-PP1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
HELP          RETRN          MAIN
  
```

3. When you are ready to exit, press [RETRN].

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## Merge Locator Lists

This option is used to merge one or more lists into a new list.

1. Enter X beside the MERGE option and press [ENTER].
2. A screen similar to the following will be displayed:

555 GJG555U7      SALES MATERIALS SYSTEM      02/23/93 15:04  
GENERAL SHIPMENT MERGE      PM: 7

MERGE:							

NEW LIST:      DESC:      \_\_\_\_\_

\*NOTE: EACH KEY MUST BE DIFFERENT AND ALREADY EXIST ON FILE.  
THE NEW LIST MUST NOT ALREADY EXIST ON FILE.

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---  
HELP      RETN      MATH

3. Enter the 4-character key of each list to be merged. The keys specified must be valid.
4. In the NEW LIST field enter a unique, 4-character key for the new list that will be created when the lists are merged. Enter a description for the list in the DESC field.
5. When you are finished, press [ENTER]. The system will merge your lists and display a confirmation message. (This process may take a few moments to complete.)
6. Press [ENTER] to return to the General Shipment Locator Menu.

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## ORDERING PREMIUMS

Merge Locator Lists  
(Batch)

This option is used to merge one or more lists into a new list. This function is similar to the other merge option. With the batch option, however, the lists are not combined until the next nightly batch merge job runs.

1. Enter **X** beside the **MERGE (BATCH)** option and press [ENTER].
2. A screen similar to the following will be displayed:

SSS GJ0555U7      SALES MATERIALS SYSTEM      02/23/93 15:04  
GENERAL SHIPMENT MERGE      FM: \_\_\_\_\_

MERGE: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

NEW LIST: \_\_\_\_\_ DESC: \_\_\_\_\_

\*NOTE: EACH KEY MUST BE DIFFERENT AND ALREADY EXIST ON FILE.  
 THE NEW LIST MUST NOT ALREADY EXIST ON FILE.

Enter--PF1--PF2--PF3--PF4--PF5--PF6--PF7--PF8--PF9--PF10--PF11--PF12--  
 HELP      RETRN      MAIN

3. Enter the 4-character key of each list to be merged. The keys specified must be valid.
4. In the **NEW LIST** field enter a unique, 4-character key for the new list that will be created when the lists are merged. Enter a description for the list in the **DESC** field.
5. When you are finished, press [ENTER]. When the next nightly batch merge job runs, the lists will be combined.
6. Press [ENTER] to return to the General Shipment Locator Menu.

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### Print Locator Lists (Batch)

This option is used to print a locator list in batch mode. The report will not be printed until the nightly batch process runs.

1. Enter the locator code for the list you wish to print. Enter X beside the **PRINT (BATCH)** option and press [ENTER].

♦ *Note:* If you do not know the locator code, mark the **PRINT (BATCH)** option and press [ENTER] to select the locator list.

2. The following screen will be displayed:

```

555 GJG556UN          SALES MATERIAL SYSTEM          06/08/93 10:02
                      LOCATOR LIST ENTRIES REPORT      PM:
LOCATOR LIST TO PRINT: CALI

REPORTS:  _ PRINT ENTIRE LIST
          _ PRINT ONLY INVALID DATA

* OPTIONS: _ DELETE INVALID DATA FROM LIST

* NOTE * WHEN YOU CHOOSE DELETE INVALID DATA FROM LIST, THE INVALID LOCATIONS
          SHOWN ON THE REPORT WILL BE DELETED FROM THE SPECIFIED LOCATOR LIST.

Enter--PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
      Help Quit Retrn      Enter      Skurd Fwrd SUBMIT      VIEW Main
  
```

3. Select the type of report you wish to print:
  - entire list
  - invalid data only
4. If you wish to delete the invalid data from the locator list, mark this option also. The invalid locators will still print on the report but will be removed from the actual list.
5. When you are ready to continue, press [SUBMIT]. The following pop-up window is displayed:

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## ORDERING PREMIUMS

```

555  CJC556UX          SALES MATERIALS SYSTEM          06/08/93 10:30
                        LOCATOR LIST ENTRIES REPORT      FN: _____

LOCATOR LIST TO PRINT: C493

REPORTS:  PRINT ENTIRE LIST
          X PRINT ONLY INVALID DATA

Enter chgs: Press ENTER to submit
Print parameters for user: WAG9W

Name.....:          Copies: 1
Area (ie. P10):
Class.....: 0
Printer.....: R000

Hold Print?.. Y (Y/N)
              ( PF3 will cancel )

LID DATA FROM LIST

DATA FROM LIST, THE INVALID LOCATIONS
LETED FROM THE SPECIFIED LOCATOR LIST.

Enter--PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
      HELP  QUIT  RETRN   ENTER   BKWRD  FRWRD  SUBMT   VIEW  MAIN

```

6. This window indicates where the report will be printed and whose name will appear on the cover sheet.

Review the NAME, AREA, PRINTER and COPIES indicated. If you wish to change them, you may do so. If these fields do not contain entries, they must be specified.

Also, make sure the HOLD PRINT option is set to N. Otherwise, the report will only be available online.

7. Press [ENTER] to submit the report request, or [PF3] to cancel.

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Chapter 5  
Other Procedures

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## OTHER PROCEDURES

### Staging Orders

Staging orders is sometimes required because occasionally a storage unit cannot physically hold all items being shipped. In those cases, shipments may need to come in waves.

- I. Review allocations to various ship-to locations. Assess size (sq. ft.) and capacity by location with appropriate sales rep input. Base staging on ship-to capacity and unique timing circumstances.
- II. Utilize Voice Mail to announce to all concerned parties that items will be ordered shortly. Instruct reps to call if they wish to alter the planned order sequence. Otherwise, order as usual.
- III. After orders have been placed, sales representatives are responsible for communicating needs (which differ from original planned timing noted in Workplan Book) via voice mail or other correspondence.
- IV. Reorder and note in Workplan Book as necessary until allocated quantities are zeroed out.

### Troubleshooting Premiums

- I. Receive voice mail, phone call or written request from sales rep identifying either a surplus or lack of promotions. These situations normally occur near the end of a reporting period. While a periodic question might be posed via voice mail by the Operations Unit personnel, the responsibility of notification of these issues should remain the sales rep's accountability. The improvement in Division Management work, with time, should reduce these issues.
- II. Once a problem is communicated, voice mail will be utilized to advise other personnel of surplus/deficit and ask for assistance (i.e., who has additional available premiums or is in need of premiums).
- III. Once parties are "connected" the Operations Unit will expedite transfer of items by shipping from operations backroom, accepting shipment from sales rep or arranging shipment between two or more sales reps.

### Handling Incremental Promotional Programs

- I. Receive information regarding incremental program details from Region (i.e., budget, guidelines, etc.)
- II. With Region Operations Manager determine chain account needs/opportunities. Contact CAMs via phone/voice mail. Split budget or items accordingly.
- III. Determine Division needs/opportunities. Contacts DMs via phone/voice mail. Split budget by sales rep based on unique opportunity communicated by DM or sales rep via voice mail).
- IV. Order items to ship-to locations, as previously noted in the Order Premium section.

## OTHER PROCEDURES

Utilizing Leftover  
Premiums

## Function 508

- V. The coordinator will track and monitor against budget, keeping appropriate management apprised of status. The Region Operations Manager will evaluate trends, usage and respond accordingly.
- I. Sales Reps are responsible for communicating leftovers in the field. The operation unit is responsible for leftovers in SMS. Check via function 524 or 508. When the commodity number is known, utilize function 508.

## Using SMS Function 508

1. With the SMS Main Menu displayed, enter 508 in the FN field and press [ENTER]. The following screen will be displayed.

GJG50811                      Sales Materials System                      06/09/93  
WSFDG                      Allocation Display by Item Number                      12:01  
   Item 383869  
CAM NW B2G 2 0000/00L CC W/POS-UN1057

optional starting a/z/d: 6324                      page 1

A/R/D	Allocated	Usage	Balance	Draw?
6324	400	0	400	NO
6328	300	300	0	NO
6330	491	491	0	NO
TOT.	1191	791	400	

Enter-PP1---PP2---PP3---PP4---PP5---PP6---PP7---PP8---PP9---PP10---PP11---PP12---  
MENU                      FORMD BACKW

2. After inputting commodity number and starting operating unit level, the system will provide a current status report of that item's availability.

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## OTHER PROCEDURES

## Function 524

## Using SMS Function 524

1. With the SMS Main Menu displayed, enter 524 in the FN field and press [ENTER]. The following screen will be displayed. Type "X" next to Summary of Sales Level Shown and press [ENTER].

GJ1524IN                      SALES MATERIALS SYSTEM                      16:42:46 05/15/93  
ALLOCATION REPORT BY SALES LEVEL  
(NOT AVAILABLE FOR TERRITORY LEVELS)

SALES LEVEL: 6326

SELECTION CRITERIA: (CHOOSE SELECTION BY ENTERING AN "X")

                                 X SUMMARY OF SALES LEVEL SHOWN  
                                 \_ SUMMARY OF SALES LEVEL SHOWN AND ONE LEVEL BELOW

PRINT DESTINATION: 6326

.....

PF1 - RETURN TO PREVIOUS SCREEN                      PA1 - HELP



## OTHER PROCEDURES

## 2. The report is similar to the following:

GJ182RM ALLOCATION BY SALES LEVEL REPORT					
SUMMARY REPORT: 6326 DULUTH DISTRICT					
MAJOR CATEGORY: COUPONS					
ITEM	DESCRIPTION	ALLOCATED	USED	REMAINING	ALLOC ABOVE
111111	MAG/STER 350 92 OCC 22487				YES
123456	MAG/STER 92 .35/PK VPR	40	40	36	
123457	MAG/STER 92 .35/PK OPC	2	2	0	
123458	MAG/STER 92 300 VPR	10	10	0	
123459	MAG/STER 92 350 CTN VPR	101	101	0	
234567	CAMEL GN Q2 200/CTN 22054	20	20	0	
234568	DORAL 600/CANTON VPR	10	10	0	
234569	WIN 30 FREE PK BOOK	20	20	0	
345678	VAN 4 QTR 40CC T-23004	129	129	0	
345679	WIN 40 1.5/2 PK 22816	319	319	0	
456789	DORAL 65 PACK VPR	381	381	41	
456799	DORAL 700 CTN VPR	50	50	23	
567890	MAG/STER 400 CTN VPR	190	190	13	
567891	CAMEL GN 150 OCC 23286	60	60	0	
567892	SALEN 1093 900 2/CTN-300	41	41	0	
567892	SALEN 1093 300/CTN	23	23	0	
567893	WIN 1093 1.5/3 PK 30027	13	13	0	
567894	WIN .60 VPR 4 Q	27	27	22	
567895	WIN PET 3 OCC 23340	4	4	0	

- II. Once the problem is identified, Region Operations Manager develops program for utilization in high volume outlet. This program will be developed by discussing the situation with appropriate CAMs/DMs.

Coordinate delivery/packing of promos with appropriate management

- III. If no clear opportunity for mass displays exists, utilize voice mail to determine which sales reps could utilize extra premiums and coordinate accordingly.

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**OTHER PROCEDURES**

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**Tracking/Monitoring  
Full-Price  
Promotions**

- IV. Finally, if no opportunity for utilization in Region is present, DT or E-Mail other Regions and inform them of availability.
- I. Since promotions are tracked by shipment data, no placement data will be monitored. The exception to this guideline is coupons — these items will still be reported by sales reps and tracked as indicated in Book II - Promotion Coordinator.
- II. Monitor SMS function 524 to double check to ensure proper utilization of allocated items. This provides allocation versus shipment tracking. (See procedures above.)
- III. If problems are noted via SMS 524, determine where error is and handle appropriately.

---

**Coordinating  
POS/PDI**

- I. Division informed to update POS by deadline date.
- II. Sales reps receive update process. Process will allow for reps to enter brand-specific needs into handheld computer while they are in the store. Time allowed to complete this update will be one to two months.
- III. After deadline date, Winston-Salem will pull report and individually pack boxes per exact sales rep requests. Added to total will be an additional 5% for shipment to centralized warehouse to cover new stores, errors, etc.
- IV. Promotion coordinator will pull up a report noting sales reps requests. One copy will be sent to reps and the master copy retained in operations unit complex.

---

**Maintaining Goals**

This task will not occur except regarding coupon items. See Book III for more information.

---

**Troubleshooting  
Additional Problem  
Areas**

- I. Promotion Coordinator will be responsible for troubleshooting the following problem areas.
- Shipments
  - Damages
  - Shortages

**OTHER PROCEDURES**

- Direct Accounts
  - shipments
- RJR Warehousing
  - shipments
  - palletize problems
  - stretchwrap problems
  - packing issues
  - quality problems
  - bills of lading
  - shipping information
  - return authorizations
- Allocations
- System issues

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Chapter  
Ordering Coupons

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**ORDERING COUPONS**

---

**Summary**

---

**Procedures**

- Develop and provide sales reps with coupon requisition forms and coupon transfers/return forms. These items should be utilized consistently by reps.
  - Ensure SIS number is assigned to each sales rep's home address. This will be utilized to ship requests to these locations, if necessary.
- I. Sales representatives send in requests for coupons to Region Operations Unit. These requests may take several forms:
- Utilize Coupon Requisition form. This should be the most frequently used method. Reps must be accountable for proper planning to ensure ongoing needs can be reasonably met using this form.
  - Utilize voice mail or telephone operations unit directly. This method should be utilized when situations call for quick turnaround time.
- II. Prior to any order placement, you should have a general idea of the current size of pertinent allocations in SMS. This can be done easily by pulling SMS function 523 - Allocation by Item Report — once per week. This report breaks down allocated items, by category, noting quantities available. This step is important since this information is used to estimate whether enough coupons exist to satisfy current and future coupon requests.

## ORDERING COUPONS

## Function 524

## Using SMS Function 524

1. With the SMS Main Menu displayed, enter 524 in the FN field and press [ENTER].

Press ENTER to continue or enter a function from the list below

1 UTIMENU SALES MATERIALS 05/10/93  
 PROD - SMSLIB MAIN MENU 08:11

Copyright (C) R. J. REYNOLDS TOBACCO CO 1989

001 - SMS SECURITY LEVEL M	524 - ALLOC BY SALES LEVEL RPT
022 - SKU USAGE BY ITEM BY MONTH	525 - ALLOCATION TRANSFER AUDIT RPT.
030 - SMN & TRAFFIC PHONE DIRECTORY	551 - WORKPLAN COMMUNICATIONS
116 - FIND BACKORDERS FOR LOCATION	553 - WORK PLANS
125 - FS COUPON RECEIPTS	559 - DIVISION MARKETING INDICATORS
126 - FS COUPON RECEIPT CORRECTION	560 - PROMOTIONAL WKP BUDGET REPORTS
210 - ITEM MASTER DISPLAY F/S	570 - WORKPLAN COMMUNICATIONS REPORT
402 - ENTER ORDERS	572 - FULL-PRICED WORKPLAN BUDGET
404 - ORDER INQUIRY	598 - WORKPLAN BOOK REPRINT
405 - LIST OF MATERIALS	599 - WORKPLAN BUDGET USAGE REPORT
406 - please test this new order inq	803 - PRINT REPORT STATUS SCREEN
417 - SPECIAL HANDLING	903 - DISPLAY USER MESSAGES
501 - SMS ALLOCATION MAINTENANCE	903 - TRANSFER TO SIS MENU
508 - SMS ALLOCATION SEARCH BY ITEM	999 - EXIT SYSTEM
509 - SMS ALLOCATION TRANSFERS	
523 - ALLOC BY ITEM REPORT	

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---  
 MENU

FN: 524

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## ORDERING COUPONS

2. The following screen will be displayed. Verify the sales level, mark an "X" beside your selection criteria and verify the print destination. Press [ENTER].

CJ15241N                      SALES MATERIALS SYSTEM                      08:19:39 05/18/93  
ALLOCATION REPORT BY SALES LEVEL  
(NOT AVAILABLE FOR TERRITORY LEVELS)

SALES LEVEL: 6326

SELECTION CRITERIA: (CHOOSE SELECTION BY ENTERING AN 'X')

     SUMMARY OF SALES LEVEL SHOWN  
X SUMMARY OF SALES LEVEL SHOWN AND ONE LEVEL BELOW

PRINT DESTINATION: 6326

.....

PF1 - RETURN TO PREVIOUS SCREEN                      PA1 - HELP

## ORDERING COUPONS

3. The screen will display a message indicating that the report was successfully submitted. Press [ENTER] to return to the SMS Main Menu. Below is a sample of this report.

GJ182RN ALLOCATION BY SALES LEVEL REPORT					
SUMMARY REPORT: 6328 DULUTH DISTRICT					
MAJOR CATEGORY: COUPONS					
ITEM	DESCRIPTION	ALLOCATED	USED	REMAINING	ALLOC ABOVE YES
111111	MAG/STER 350 92 OCC 22487				
123456	MAG/STER 92 .35/PK VPR	40	40	36	
123457	MAG/STER 92 .35/PK OPC	2	2	0	
123458	MAG/STER 92 300 VPR	10	10	0	
123459	MAG/STER 92 350 CTN VPR	101	101	0	
234567	CAMEL GN Q2 200/CTN 22034	20	20	0	
234568	DORAL 600/CARTON VPR	10	10	0	
234569	WIN 85 FREE PK BOOK	20	20	0	
345678	VAN 4 QTR 40CC T-23004	129	129	0	
345679	WIN 4Q 1.5/2 PK 22816	319	319	0	
456789	DORAL 65 PACK VPR	381	381	41	
456799	DORAL 700 CTN VPR	50	50	23	
567890	MAG/STER 400 CTN VPR	190	190	13	
567891	CAMEL GN 150 OCC 23286	60	60	0	
567892	SALEM 1093 900 2/CTN-300	41	41	0	
567892	SALEM 1093 300/CTN	23	23	0	
567893	WIN 1093 1.5/3 PK 30027	13	13	0	
567894	WIN .60 VPR 4 Q	27	27	22	
567895	WIN PET 3 OCC 23340	4	4	0	

If no allocation exists for a desired coupon, the PRC has three alternatives:

- Request from Sales Area
- Request from other Divisions/Regions
- Manufacture coupons via Coupon Printer @ office. (see pages 1-10).

III. Process the coupon requisitions one by one.

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## ORDERING COUPONS

Ordering Coupons  
Via SMS Function  
402

1. Log on to SMS and invoke function 402, Order Entry. The following screen is displayed:

402 GJIS72UN                      SALES MATERIALS SYSTEM                      01/19/93 08:16  
ADDRESS SCREEN 1                      ORDER NUMBER: 3018-0043

ORDERING REGION/DIVISION: 2126                      TX: \_\_\_\_\_

SHIPPING DESTINATION: (SELECT ONE)

ACCOUNT NUMBER: \_\_\_\_\_ (BIS ACCOUNT NUMBER)  
DIVISION OFFICE: 2126 (REG/DIV NUMBER)  
TERRITORY: \_\_\_\_\_ (TERR. NUMBER FOR SALES REP. WAREHOUSE)

ENTER EMPLOYEE NUMBER: \_\_\_\_\_ (IF ORDER MEMO IS TO GO TO SALES REP.'S HOME)

PF12 - MAIN MENU                      PF1 - HELP

2. Enter the appropriate information and press [ENTER]. For demonstration purposes we have entered a Division of 2126. Each order for coupons should be sent directly to the requester's home address or outside storage.
  - ♦ *Note:* Coupon Storage at the Division and Operations Unit office should be eliminated or at least minimized.
3. The order entry ship-to screen will be displayed:

402 CJIS72UN                      SALES MATERIALS SYSTEM                      02/23/93 10:03  
ADDRESS SCREEN 2                      ORDER NUMBER: 3054-0877  
FW: \_\_\_\_\_

ORDERING OFFICE: 2126  
\*\*\*\*\*  
SHIP TO: ACCOUNT NUMBER:  
DIVISION OFFICE: 2136  
TERRITORY:  
\*\*\*\*\*  
SHIP TO ADDRESS: F. J. ARMSTRONG, JR.  
8180 NORTH POINT BLVD  
SUITE B  
WINSTON-SALEM NC 27105

SALES REP. NUMBER:                      SALES REP.:                      /

---

ENTER - CONTINUE WITH ORDER  
PF3 - RETURN TO PREVIOUS SCREEN  
PF12 - MAIN MENU

PF1 - HELP

4. Verify that this information is correct.
5. Press [ENTER] to continue. The order type selection screen will be displayed:

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**ORDERING COUPONS**

402 GJ1573UN      SALES MATERIALS SYSTEM      01/19/93 08:20  
ORDER ENTRY SELECT      ORDER NUMBER: 3019-0056  
FN: \_\_\_\_\_

Select one type of order entry:

- CATEGORY ORDER
- FORM/ITEMS ORDER
- MODULAR BOOK ORDER
- PROMOTION ORDER
- COPY EXISTING ORDER

OPTIONAL FUTURE DELIVERY - WEEK OF: \_\_\_\_\_ (YYMMDD format)

---

PF3 - RETURN TO PREVIOUS SCREEN      PF1 - HELP  
PF12 - MAIN MENU

**6. Select the type of order you wish to create:**

- **CATEGORY ORDER** - Use this option when you wish to select the items to be ordered by category (such as Permanent POS, Premium, etc.).
- **FORM/ITEMS ORDER** - Use this option when the commodity numbers of items are known.
- **MODULAR BOOK ORDER** - Currently unavailable (future enhancement)
- **PROMOTION ORDER** - Use this option to order items for a promotion.
- **COPY EXISTING ORDER** - Use this option when the order you are creating is similar to an existing order, as some data entry can be omitted.

**7. If you wish to enter an order for future delivery (instead of immediate delivery), enter the desired delivery date in the WEEK OF field. The date specified cannot be more than 210 days into the future, and must be entered in YYMMDD format.**

---

**Summary of Process**

8. Press [ENTER] to continue.
  9. The next section contains a summary of the process for using any of the order types. It is followed by detailed instructions for each order type.
1. At the order type selection screen, select the desired order type. If you wish to request a future delivery date, enter the desired date. The date cannot be more than 210 days into the future. It must be entered in YYMMDD format.
  2. Press [ENTER] to continue.
    - *If you have requested a Category order:*
      - The system will prompt you to select a major category. For each major category selected, you must select at least one intermediate and minor category. Up to 4 major categories can be selected; up to 6 intermediate categories can be selected for each major category; up to 20 minor categories can be selected for each intermediate category.
      - When category selections are complete, the system lists the associated items. Enter the desired quantity of each item and press [PF4].
    - *If you have requested a Form/Items order:*
      - The system will prompt you to enter each item and the desired quantity. Enter the desired items/quantities and press [PF4].
    - *If you have requested a Promotion order:*
      - To view a specific type of promotion, position the cursor in the TYPE column and press [PF1] (HELP). Select the type of promotion you wish to view. (This step is optional.)
      - Select the promotion for which you wish to order items
      - The system will then list the items associated with the promotion. Enter quantities for the desired items and press [PF4].
    - *If you are copying an existing order:*
      - The system will prompt you to enter the existing order number you wish to copy items and quantities from.
      - The system will then list the items/quantities associated with the specified order. (This screen is similar to Form/Items Order.) Enter/modify items/quantities for the new order you are creating and press [PF4].

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**ORDERING COUPONS**

3. The Order Review screen is displayed. You can modify the quantities on this screen but cannot add items. Press [PF4] to continue.
4. If all items requested are in inventory, the Order Completion screen is displayed. If all items are not in inventory the Inventory Exceptions screen is displayed.
5. From either screen you can request special handling.
6. When you are ready to process the order, press the appropriate PF key ([PF4] from the Order Completion screen; [PF4] or [PF5] from the Inventory Exceptions screen).

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## ORDERING COUPONS

## Category Order

Use this option when you want to select the items to be ordered by category, such as permanent POS items, premiums, coupons, etc.

1. When Category Order is selected, the Major Categories screen is displayed:

```

402 GJIS65VN          SALES MATERIALS SYSTEM          01/19/93 08:21
                        MAJOR CATEGORIES                ORDER NUMBER 3019-0056
                                                           PM:
PLACE AN 'X' NEXT TO CATEGORY(S) (MAXIMUM OF 4) YOU DESIRE AND PRESS ENTER:

- TEMPORARY POS          - PERMANENT POS          - CTN MERCH/ELEC SEC
- PACKAGE MERCH          - PERMANENT DISPLAYS - SALES REP. SUPPLIES
- MILITARY               - VENDING           - PREMIUMS
- BANK MATERIALS         - SPCL/TEST ITEMS (TOB) - OFFICE SUPPLIES
- X COUPONS              - REFURBISHING       - WOOD SPRING LD-SPEC
- CW-SERIES              - BANK MATERIALS

*** END OF CATEGORY ***

PF3 - RETURN TO PREVIOUS SCREEN
PF12 - RETURN TO MAIN MENU
PF1 - HELP
  
```

2. Enter X beside the categories you wish to select from. Up to 4 categories can be selected at one time.
3. Press [ENTER] to continue.

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## ORDERING COUPONS

4. The Intermediate Categories screen is displayed for the first major category selected:

402 GJ1586UN      SALES MATERIALS SYSTEM      01/19/93 08:23  
MAJOR CATEGORY: COUPONS      INTERMEDIATE CATEGORIES      ORDER NUMBER: 3019-0056  
PM: \_\_\_\_\_

PLACE AN 'X' NEXT TO CATEGORY(S) (MAXIMUM OF 6) YOU DESIRE AND PRESS ENTER:

CANCL	X DORAL	SALEM
- WINSTON	- NEWTEST	- ACCESSORIES
- LOGO ITEMS	- DECALS	- MIP - POS
- LOTTERY INSERTS	- RIP - POS	- REFURBISHING
- SPECIAL POS	- HORIZON	

\*\*\* END OF CATEGORY \*\*\*

PF3 - RETURN TO MAJOR CATEGORY  
PF12 - RETURN TO MAIN MENU      PF1 - HELP

5. Enter X beside the categories you wish to select from. Up to 6 categories can be selected at one time.
6. Press [ENTER] to continue. If multiple major categories were selected, intermediate categories for the next major category will be displayed. This process will continue until intermediate categories have been selected for each major category.

## ORDERING COUPONS

7. When intermediate categories have been selected for each major category, the Minor Categories screen is displayed. This screen lists minor categories for the first major/intermediate category combination:

```

402 0J1587UN          SALES MATERIALS SYSTEM          01/19/93 08:31
                        MINOR CATEGORIES                ORDER NUMBER: 3019-0056
MAJOR CATEGORY: PERMANENT POS
INT CATEGORY: CAMEL
PLACE AN 'X' NEXT TO CATEGORY(S) (MAXIMUM OF 20) YOU DESIRE AND PRESS ENTER:

X POS ITEMS          - RIP          - NASA
- WUSA              - WUSA          - SASA
- PMSA              - WMSA          - NATIONAL

*** END OF CATEGORY ***

PF3 - RETURN TO INTERMEDIATE CATEGORY
PF12 - RETURN TO MAIN MENU
PF1 - HELP
  
```

8. Enter X beside the categories you wish to select from. Up to 20 categories can be selected at one time.
9. Press [ENTER] to continue. If multiple intermediate categories were selected or multiple major categories were selected, minor categories for the next intermediate category will be displayed. This process will continue until minor categories have been selected for each major/intermediate category combination.

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## ORDERING COUPONS

10. When minor categories have been selected for all major/intermediate categories, the system will list the items associated with the category combinations requested. This list will begin with the first major/intermediate/minor category specified:

```

402  GJ158701          SALES MATERIALS SYSTEM          01/19/93 08:31
                        ITEM QUANTITY ENTRY              ORDER NUMBER: 3019-0056

MAJOR CATEGORY: PERMANENT POS
INT CATEGORY:  CAMEL
MINOR CATEGORY: POS ITEMS

SK  QTY  ITEM  ---DESCRIPTION-----  UNITS/SKU  MAXIMUM  ORIGINAL  L  REMAIN
  ORDER  ALLOC  E  ALLOC
  QTY    QTY  V  QTY

-----
208353 CAMEL 3-D CIGARETTES SOL  10 BOX    0          0  0
208408 CAMEL BUSINESS HOURS OPE  10 BOX    0          0  0
390898 CAMEL BATTERY CLOCK        6 BOX    10 D      10  10
390920 CAMEL FLOOR ASHTRAY        2 BOX    10 D      10  10
390942 CAMEL LANE CLOSED          20 BOX    15 D      15  15
390964 CAMEL NEON                 1 BOX    15 D      15  15
391030 CAMEL PRICING BANNER 6"X   25 BOX    2 D        2   2
391063 CAMEL GROUND MOUNT         1 BOX    10 D      10  10
391074 CAMEL POLE MOUNT           1 BOX    22 D      22  22
391085 CAMEL CURB MOUNT           1 BOX    5 D        5   5

*** MORE DATA EXISTS ***

PF3 - PREVIOUS SCREEN
PF4 - CONTINUE WITH ORDER
PF7 - START OF DATA

PF12 - MAIN MENU
PF1 - HELP
  
```

11. For each item, this screen indicates the maximum order quantity, current allocation quantity, and remaining allocation quantity (if any).
12. Specify the quantity of each item you wish to order in the QTY field. If you do not want an item, leave the quantity field blank. If multiple pages of items exist, press [ENTER] to scroll forward.
13. If you have specified more than 1 major, intermediate or minor category, there will be a screen like this for each combination. Press [ENTER] to view additional screens of information and enter quantities.
14. When you have entered quantities for the desired items, press [PF4] to continue with the order.

## ORDERING COUPONS

15. The system now displays the order for you to review:

```

402 GJ15040N          SALES MATERIALS SYSTEM          01/19/93 08:32
                        ORDER REVIEW                     ORDER NUMBER: 3019-0056

SKU  (LINES 1 - 2 OF 2 SHOWN)
QTY  ITEM DESCRIPTION----- UNITS/SKU
1___ 208353 CAMEL 3-D CIGARETTES S      10 BOX
1___ 208406 CAMEL BUSINESS MOORS O      10 BOX

MAXIMUM ORIGINAL  L  REMAIN
ORDER  ALLOC  E  ALLOC
QTY    QTY  V  QTY
      0      0
      0      0

(*) ASTERISKS INDICATE THAT THE MAXIMUM ORDER QTY HAS ORIGINALLY EXCEEDED
PF3 - RETURN TO PREVIOUS SCREEN      PF7 - SCROLL UP
PF4 - CONTINUE WITH ORDER            PF8 - SCROLL DOWN
PF12 - MAIN MENU                      PF1 - HELP
  
```

16. This is the SMS Order Review screen. It displays the required SKU quantity of each item requested and units per SKU. It also indicates the maximum order quantity, current allocation quantity, and remaining allocation quantity (if any).
17. As with the previous screen, you can modify the quantities indicated.
18. When you are ready to continue with the ordering process, press [PF4] to continue with the order entry process.

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**ORDERING COUPONS**

19. The system now checks the inventory to determine if all of the items needed are available. If any of the requested items are *not currently in inventory*, a screen will be displayed which lists the items/quantities that will be placed on backorder. This screen allows you to:

- Continue with this order and put the missing items on back order
- Continue with this order and cancel items on back order
- Suspend the order, reserving inventory for the available items
- Cancel the order

(This screen is shown in the discussion on entering a promotion order.)

20. If all items *are in inventory*, the system will display the Order Completion screen:

402 GJ1584U1                      SALES MATERIALS SYSTEM                      01/19/93 08:33  
   ORDER COMPLETION                      ORDER NUMBER: 3019-0056

YOUR ORDER 3019-0056  
IS AVAILABLE FOR IMMEDIATE SHIPMENT.

ESTIMATED ORDER COST:                      235.36  
SPECIAL HANDLING COST:

---

PF4 - COMPLETE ORDER  
PF6 - SPECIAL HANDLING  
PF11 - RESTART ORDER  
PF12 - MAIN MENU (ABORT ORDER)

PF1 - HELP

21. This screen provides you with your order number and cost.

**WARNING:** This is the point of no return! If you go forward from here, an order will be generated.

## ORDERING COUPONS

22. From this screen you can:

- Press [PF4] to continue with the order entry process. This should only be used if you are sure you want to generate the order!
- Press [PF6] to request special handling.
- Press [PF11] to restart this order (return to order type selection screen). The order you have entered will be lost. This should be used if you wish to start over.
- Press [PF12] to abort this order (return to SMS Main Menu). The order you have entered will be lost.

23. If you need to request special handling press [PF6]. The system will display a list of options for you to select from:

```

402 GJ -----SPECIAL HANDLING CATEGORIES----- 08:33
GP COST DESCRIPTION PHONE 9-0056
-----
12.99 THIS IS A TEST

PHONE NUMBER: ( ) -

Select up to 10 special handling items to be included with
your order (no duplicate group items allowed).

PF4 - Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---
PF6 - HELP Cncl Cont BKWD FRWD
PF11 -
PF12 - -----HELP
  
```

24. Enter X beside each option needed. Up to 10 options can be selected. When you are ready to continue press [PF4]. The system will return to the Order Completion screen and display the handling costs.

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## ORDERING COUPONS

25. If you wish to generate the order press [PF4]. Otherwise, use one of the other options.
26. When [PF4] is pressed, the following pop-up window will be displayed:

402 GJ1584U1      SALES MATERIALS SYSTEM      02/23/93 10:08  
ORDER COMPLETION      ORDER NUMBER: 3054-0977

YOUR ORDER 3054-0977  
IS A FUTURE ORDER FOR 93-03-29

ESTIMATED ORDER COST:      145.65  
SPECIAL HANDLING COST:      12.99

-----SPECIAL INSTRUCTIONS-----  
Account Special Instructions: \_\_\_\_\_

27. Enter any special instructions or sales rep information in the space provided. This entry is optional. (This information was previously entered on the Address Screen, but was moved due to processing procedures.)
28. When you are ready to continue, press [ENTER]. The order is generated and the following screen is displayed:

## ORDERING COUPONS

CJ1578U1	SALES MATERIAL SYSTEM ORDER ENTRY COMPLETED	12/17/92 ORDER NUMBER: 3019-0056
----------	--	-------------------------------------

YOUR ORDER 3019-0056 HAS BEEN SUCCESSFULLY PROCESSED.

ESTIMATED ORDER COST :	605.66
SPECIAL HANDLING COST:	12.99

\*\*\*\*\*  
ENTER - PROCESS A NEW ORDER WITH NEW SHIP-TO ADDRESS  
PF2 - PROCESS A NEW ORDER WITH SAME SHIP-TO ADDRESS  
PF12 - RETURN TO MAIN MENU

29. At this point, the system has adjusted the inventory to reflect your order, modified any allocations, and stored the order on the order file.

30. From here you can:

- Press [ENTER] to process another order with a different ship-to address
- Press [PF2] to process another order with the same ship-to address
- Press [PF12] to return to the SMS Order Entry Menu

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## ORDERING COUPONS

### Form/Items Order

**Use this option when you want know the item numbers of the items you wish to order. It allows you to enter the item numbers/quantities directly.**

- 1. When Form/Items Order is selected, the following screen is displayed:**

[illegible]

2. Enter the item number and quantity of each item you wish to order. Up to 60 different items can be specified.
3. Press [PF4] to continue. The Order Review screen will be displayed.

On this screen you can modify the SKU quantity. When you are ready to continue, press [PF4].

## ORDERING COUPONS

4. The system now checks the inventory to determine if all of the items needed are available.
  - If any of the requested items are *not currently in inventory*, a screen will be displayed which lists the items/quantities that will be placed on back-order.

**WARNING!** This is the point of no return! If you go forward from here, an order will be generated!

  - If all items *are in inventory*, the system will display the Order Completion screen. This screen provides you with your order number and cost.

**WARNING!** This is the point of no return! If you go forward from here, an order will be generated!
5. If you have reached the Order Completion screen, the same options are available as for the Category order type:
  - Press [PF4] to process this order. This should only be used if you are sure you want to generate the order!
  - Press [PF6] to request special handling.
  - Press [PF11] to restart this order (return to order type selection screen). The order you have entered will be lost. This should be used if you wish to start over.
  - Press [PF12] to abort this order (return to SMS Main Menu). The order you have entered will be lost.
6. When you are ready to generate the order, press [PF4]. The order is generated and the following screen is displayed:

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## ORDERING COUPONS

6

GJ1578U1                      SALES MATERIAL SYSTEM                      12/17/92  
ORDER ENTRY COMPLETED                      ORDER NUMBER: 3154-1307

YOUR ORDER 3154-1307 HAS BEEN SUCCESSFULLY PROCESSED.

ESTIMATED ORDER COST :                      148.63  
SPECIAL HANDLING COST:

.....  
ENTER - PROCESS A NEW ORDER WITH NEW SHIP-TO ADDRESS  
PF2 - PROCESS A NEW ORDER WITH SAME SHIP-TO ADDRESS  
PF12 - RETURN TO MAIN MENU

7. At this point, the system has adjusted the inventory to reflect your order, modified any allocations, and stored the order on the order file.
8. From here you can:
  - Press [ENTER] to process another order with a different ship-to address
  - Press [PF2] to process another order with the same ship-to address
  - Press [PF12] to return to the SMS Order Entry Menu

## ORDERING COUPONS

## Promotion Order

Use this option when you wish to order items for a particular promotion.

1. When Promotion Order is selected, the Promotion Selection screen is displayed:

402	GJG175UN	SALES MATERIALS SYSTEM		01/19/93 10:50
		PROMOTION SELECTION		ORDER NUMBER: 3019-0197
List from: 200382				FN: _____
Program	Type	Starting Date	Ending Date	Program Title
200382	PREMIUM	02/24/92	01/29/93	CAMEL B3GF FLEECE SHORTS
201693	COUPON	09/21/92	01/29/93	CAH GM Q4 B2 ON-CTH CPM
201696	PREMIUM	09/21/92	01/29/93	CAH GM Q4 B4GF TACKLE T/SH
201698	PREMIUM	09/21/92	01/29/93	CAH GM Q4 B3GF HUNT'G CAP
201719	PREMIUM	09/21/92	01/29/93	VANTAGE B3GF 1993 PLANNER - 4TH QUARTER
201720	PREMIUM	09/21/92	01/29/93	VANTAGE B3GF CIGARETTE CASE- 4TH QUARTER
201721	PREMIUM	09/21/92	01/29/93	VANTAGE B2GF CLASSIC STYLED INK PEN
201723	PREMIUM	09/21/92	01/29/93	VANTAGE B2GF "PACK MATE" LIGHTER-4TH QTR
201830	VPR	09/21/92	01/29/93	WINSTON-B3.00/CARTON VPR 4TH QTR
202192	VPR	08/24/92	01/29/93	MORE4TH QTR. 8.50/PK OPTION VPR
202204	VPR	08/24/92	01/29/93	VANTAGE 4TH QTR 8.50/VPR (OPT/SALES)
202265	PREMIUM	08/24/92	01/29/93	MCSA-B4GF GENERIC STATE FAIR
202416	PREMIUM	09/21/92	01/29/93	NASA B3GF HUNTER'S ORANGE CAP
202528	VPR	08/31/92	01/30/93	WINSTON-MNSA CARTON BUYDOWN
202564	PREMIUM	09/28/92	01/29/93	NASA B1CGF LS ATLANTA T-SHIRT (HOOTERS)
PF3 - PREVIOUS SCREEN   PF7 - TOP OF DATA   PF12 - MAIN MENU   PF1 - HELP				

2. To view additional pages of promotions, press [ENTER]. To return to the top of the list, press [PF7].
3. If you wish to narrow down this list to one particular type of promotion, position the cursor in the TYPE column and press [PF1] (HELP). A pop-up window will display the following options:

- C    Coupon Promotions
- P    BxGxF Promotions
- R    Premium Promotions
- V    VPR Promotions
- "    (blank) All Promotion Types

Enter the desired promotion type and press [ENTER]. The system will display only promotions for the type specified.

◆ Note: This step is optional.

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## ORDERING COUPONS

4. Select the promotion you wish to order items for and press [ENTER]. Only 1 promotion can be selected.
5. The Form/Items Order screen will be displayed, listing each of the items needed for the promotion:

[illegible]

6. Enter the quantity of each item you wish to order in the **QTY** field. If you do not wish to order any item, leave the **ITEM** and **QTY** fields blank.

**You may also add other items/quantities on this screen. Up to 60 Items can be specified on this screen.**

7. When you are ready to continue with the order press [PF4]. The Order Review screen will be displayed.

On this screen you can modify the SKU quantity. When you are ready to continue, press [PF4].

## ORDERING COUPONS

8. The system now checks the inventory to determine if all of the items needed are available.

If all items *are in inventory*, the system will display the Order Completion screen. This screen provides you with your order number and cost. If you continue with the order process from this screen, the order will be generated.

9. If any of the requested items are *not currently in inventory*, a screen will be displayed which lists the items/quantities that will be placed on backorder:

```

402 CJ1584U1          SALES MATERIALS SYSTEM          01/19/93 10:56
ORDER FROM: 2126      INVENTORY EXCEPTION          ORDER NUMBER: 2019-0197
SHIP TO: 2126 / 2126XX
ITEM  DESCRIPTION----- (LINES 1 - 1 OF 1 SHOWN)
390920 CAMEL LIGHTER      REQUESTED  AVAILABLE  BACKORDER
                                1           0      **  1 **

ESTIMATED ORDER COST:      65.00  SPECIAL HANDLING COST:

PF4 - SHIP NOW (SHIP BACKORDER WHEN AVAILABLE)  ** - DENOTES SUBSTITUTE ITEMS
PF5 - SHIP NOW (CANCEL BACKORDER)               PF6 - SPECIAL HANDLING
PF9 - SUSPEND ORDER (RESERVES INVENTORY)          PF7 - SCROLL UP
PF10 - HOLD UNTIL BACKORDERS ARE FILLED           PF8 - SCROLL DOWN
PF11 - RESTART ORDER                             PF12 - MAIN MENU      PF1 - HELP
  
```

10. For each item needed, this screen indicates the quantity requested, available, and on backorder. From this screen you can:

- Press [PF4] to ship the available items and put the missing items on back order. This will process the order!
- Press [PF5] to ship the available items and cancel the items on back order. This will process the order!
- Press [PF6] to request special handling.
- Press [PF9] to suspend the order. (This will reserve inventory for your order but will not process the order.) When [PF9] is pressed, you will be prompted to enter special Sales Rep instructions (optional).

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**ORDERING COUPONS**

- Press [PF10] to hold the entire order until backorders are filled. When [PF10] is pressed, you will be prompted to enter special Sales Rep instructions (optional).
- Press [PF11] cancel the entire order.

11. If you need to request special handling, press [PF6].

12. To continue with the order entry process, press [PF4] or [PF5]. The system will prompt you to enter any special Sales Rep instructions. When you are ready to continue, press [ENTER]. Your order will be generated and the following message is displayed:

**YOUR ORDER ####-#### HAS BEEN SUCCESSFULLY PROCESSED.**

At this point, the system has adjusted the inventory to reflect your order, modified any allocations, and stored the order on the order file.

13. From here you can:

- Press [ENTER] to process another order with a different ship-to address
- Press [PF2] to process another order with the same ship-to address
- Press [PF12] to return to the SMS Order Entry Menu

**Copy Existing Order**

Use this option when you wish to copy the items/quantities on an existing order to a new order. This is a fast way to create an order when the items/quantities for the two orders are similar.

1. When this option is selected the system will prompt you to enter the number of the order you wish to copy. The order specified must be a valid SMS order number.
2. When [ENTER] is pressed the Form/Items Order screen is displayed. This screen lists the items/quantities of the "copy from" order.
3. Modify the items/quantities, as desired. You may also add new items.
4. The remainder of this process is the same as for promotion orders. Refer to steps 7-13 in the previous section for additional information.
  - Requesting coupons from the Sales Area — utilize Sales Area guidelines to phone, fax or DT needs to appropriate personnel.
  - Requesting coupon from other Divisions. This option should be utilized when rapid turnaround time of Sales Rep coupon requests is not necessary. The most efficient method of requesting coupons is to determine which operating units have allocations of the coupon needed. To do so, utilize function 508.

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## ORDERING COUPONS

## Function 508

1. With the SMS Main Menu displayed, enter 508 in the FN field and press [ENTER].

1 UTIMENU		SALES MATERIALS		05/18/93	
PROD - SMSLIS		MAIN MENU		09:28	
COPYRIGHT (C) R J REYNOLDS TOBACCO CO 1989					
001 - SMS SECURITY LEVEL M	524 - ALLOC BY SALES LEVEL RPT				
022 - SKU USAGE BY ITEM BY MONTH	525 - ALLOCATION TRANSFER AUDIT RPT.				
030 - SUM & TRAFFIC PHONE DIRECTORY	551 - WORKPLAN COMMUNICATIONS				
116 - FIND BACKORDERS FOR LOCATION	555 - WORK PLANS				
125 - FS COUPON RECEIPTS	559 - DIVISION MARKETING INDICATORS				
126 - FS COUPON RECEIPT CORRECTION	560 - PROMOTIONAL WKP BUDGET REPORTS				
210 - ITEM MASTER DISPLAY F/S	570 - WORKPLAN COMMUNICATIONS REPORT				
402 - ENTER ORDERS	572 - FULL-PRICED WORKPLAN BUDGET				
404 - ORDER INQUIRY	598 - WORKPLAN BOOK REPRINT				
405 - LIST OF MATERIALS	599 - WORKPLAN BUDGET USAGE REPORT				
406 - please test this new order inq	803 - PRINT REPORT STATUS SCREEN				
417 - SPECIAL HANDLING	903 - DISPLAY USER MESSAGES				
501 - SMS ALLOCATION MAINTENANCE	983 - TRANSFER TO SIS MENU				
508 - SMS ALLOCATION SEARCH BY ITEM	999 - EXIT SYSTEM				
509 - SMS ALLOCATION TRANSFERS					
523 - ALLOC BY ITEM REPORT					

Enter-PP1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---  
MENU

FN: 508

## ORDERING COUPONS

2. The following screen will be displayed. Enter the coupon commodity number and the starting operating unit.

GJG50811 NSFDC		Sales Materials System Allocation Display By Item Number Item		05/18/93 08:28	
optional starting s/r/d:				page#	
A/R/D -----	Allocated -----	Usage -----	Balance -----	Draw? -----	
Enter--PF1--PF2--PF3--PF4--PF5--PF6--PF7--PF8--PF9--PF10--PF11--PF12-- MENU FORMD BACKW					

The results will indicate current usage and balances for Divisions, Regions and Sales Areas requested. Once specific operating units that appear to have ample allocations are identified, requests should be communicated via phone, fax, DT.

### Printing Coupons

- IV. If allocations cannot be obtained or quick turnaround time is necessary to supply coupons to the rep, coupon printers are available in Operations unit which should be utilized to produce appropriately valued coupons in desired amounts. This coupon printer should be utilized **only when allocations cannot be obtained elsewhere quickly enough**. Once coupons are printed, steps should be taken to ensure requesting party has coupons in hand within 1-3 days.

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Chapter 7  
Maintaining Backroom Inventories

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# MANAGING BACKROOM INVENTORIES

## Summary

- I. The requesting party will receive shipping ticket notifying them of estimated arrival date, types and quantities. Upon receipt of this ticket, the sales rep should go to the ship-to site and physically verify quantities and types actually received. Discrepancies between shipping ticket amounts and actual amounts received should be noted accordingly on the shipping ticket. The ticket is then mailed back to the Operations Unit within 24 hours of receipt.
- II. Upon receipt by the Operations Unit of their copy of the shipping ticket, the Promotion Coordinator will access SMS function 125 to confirm that coupons were received. This is done by matching the order number of the shipment in question with the appropriate order number found on the computer screen. Input, by item, the actual quantity received as indicated on the shipping ticket (by SKUs). This number reduces the outstanding balance of the item by the amount input (i.e., if the quantities match, the item is officially "received" and removed from the list).
- III. The Promotion Coordinator will match the original order documentation with the returned shipping verification. This review will entail searching for discrepancies between the two documents. Any differences can be adjusted with Miscellaneous Adjustments in CMS.

1. With the SMS Main Menu displayed, enter 125 in the FN field and press [ENTER].

## Function 125

```

Press ENTER to continue or enter a function from the list below
1  UTIMENU          SALES MATERIALS          05/18/93
PROD - SMSLTS      MAIN MENU                09:29
-----
COPYRIGHT (C) R J REYNOLDS TOBACCO CO 1989
001 - SMS SECURITY LEVEL M      524 - ALLOC BY SALES LEVEL RPT
022 - SRV USAGE BY ITEM BY MONTH 525 - ALLOCATION TRANSFER AUDIT RPT.
030 - SMK & TRAFFIC PHONE DIRECTORY 551 - WORKPLAN COMMUNICATIONS
115 - FIND BACKORDERS FOR LOCATION 555 - WORK PLANS
125 - FS COUPON RECEIPTS        559 - DIVISION MARKETING INDICATORS
126 - FS COUPON RECEIPT CORRECTION 560 - PROMOTIONAL WKP BUDGET REPORTS
210 - ITEM MASTER DISPLAY F/S    570 - WORKPLAN COMMUNICATIONS REPORT
402 - ENTER ORDERS              572 - FULL-PRICED WORKPLAN BUDGET
404 - ORDER INQUIRY            598 - WORKPLAN BOOK REPRINT
405 - LIST OF MATERIALS        599 - WORKPLAN BUDGET USAGE REPORT
406 - please test this new order inq 603 - PRINT REPORT STATUS SCREEN
417 - SPECIAL HANDLING         903 - DISPLAY USER MESSAGES
501 - SMS ALLOCATION MAINTENANCE 903 - TRANSFER TO SIS MENU
508 - SMS ALLOCATION SEARCH BY ITEM 999 - EXIT SYSTEM
509 - SMS ALLOCATION TRANSFERS
523 - ALLOC BY ITEM REPORT
-----
Enter--PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
MENU
  
```

2. The following screen will be displayed. If coupons have been ordered, then the number, description and amount shipped will be displayed.

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## MANAGING BACKROOM INVENTORIES

```

125 - M      SALES MATERIALS FIELD SALES RECEIPT      93-05-18 00:29
UPD REC AMOUNT - PRESS PF2 OR- ENTER TO CONTINUE

RECEIVING DIVISION: 6326XX

ORDER  ITEM      ITEM      SKU(S)  NEXT FUNCTION,
NUMBER NUMBER  DESCRIPTION  SHIPPED  RECEIVED  OUTSTANDING
                                     BALANCE
31270614 382527  SVGS.'93 NB OFC 35 32121 12/ 10      10
31270614 382538  SVGS.'93 NB OFC 40 32122 12/ 20      20
31270614 382560  SVGS.'93 NB OFC 50 32124 12/  8       8
31241109 382560  SVGS.'93 NB OFC 50 32124 12/  5       5
31241109 382450  SVGS.'93 NB OCC 500 32135 12  4       4
31231915 409136  MULTIBRAND 500/CTN-33013-06/  0       0
31231906 409136  MULTIBRAND 500/CTN-33013-06/ 11      11
31231896 409136  MULTIBRAND 500/CTN-33013-06/  8       8
31231888 409136  MULTIBRAND 500/CTN-33013-06/ 11      11
31231879 409136  MULTIBRAND 500/CTN-33013-06/  8       8
31231871 409136  MULTIBRAND 500/CTN-33013-06/ 12      12
31231851 409136  MULTIBRAND 500/CTN-33013-06/ 11      11
31231846 409136  MULTIBRAND 500/CTN-33013-06/ 10      10
31231837 409136  MULTIBRAND 500/CTN-33013-06/  0       0

ENTER - TO CONTINUE      PF1 - MAIN MENU      PF3-UPDATE

```

3. To receive coupons, [TAB] to the RECEIVED field and enter the number of coupons received and press [PF2] to update the screen.
  4. The amount in the BALANCE field will be decreased by the amount entered in the RECEIVED field. If you receive the exact amount as shown shipped, then the item will be removed from the screen.
- IV. On receipt, coupons must then be issued to appropriate Sales Reps. The Promotion Coordinator will access CMS in the Management Summaries option of the SIS main screen. All verified amounts are "issued" to the appropriate sales rep via this system. Once entered, CMS will automatically update the sales reps' on hand inventory based on this new data. A new enhancement to this screen now allows the operator to update the appropriate coupon goal in SIS by placing an "X" beside the pertinent item and sales rep.

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**MANAGING BACKROOM INVENTORIES****Issuing Coupons and  
Updating Goals**

1. With the SIS Main Menu displayed, place an "X" beside "Management Summaries" and press [ENTER].

GHCM01NM

SALES INFORMATION SYSTEM 05/18/93 08:30:06

APPLICATION SELECTION MENU

MASTER LIST

X MANAGEMENT SUMMARIES

CHAIN HEADQUARTERS

PAYMENT SYSTEMS

PRINT REPORT

HAND-HELD MESSAGES

DOCUMENTATION TRANSPORTER

SALES LEVEL SHIPPING ADDRESS

BUSINESS INFORMATION

SALES EXPENSE

LABOR REPORTING

SALES MATERIALS

BULLETIN BOARD

PLACE AN X NEXT TO ONE OPTION.

PRESS THE PF1 KEY TO LEAVE THE SALES INFORMATION SYSTEM.

## MANAGING BACKROOM INVENTORIES

2. Place an "X" beside "Employee Coupon Inventory by Employee" and press [ENTER].

```

CHCMF0000          MANAGEMENT SUMMARIES MENU          93-05-10
                                                           08:30

- ACTIVITY SUMMARIES
- DAILY SALES REP DETAIL CALLS
- ACCOUNTS NOT CONTACTED SUMMARY
- CHAIN SUMMARIES
- ACTIVITY GOALS MAINTENANCE

- BACKROOM COUPON INVENTORY
X EMPLOYEE COUPON INVENTORY BY EMPLOYEE
- EMPLOYEE COUPON INVENTORY BY COUPON
- SALES REP COMMENTS
- VIEW EDITED SCAN DATA

ENTER 'X' NEXT TO ITEM YOU WISH TO SELECT

PF1 - RETURN TO SIS MAIN MENU
  
```

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## MANAGING BACKROOM INVENTORIES

3. The following screen will be displayed. Place an "X" beside the desired employee and press [ENTER].

```

      S1SCT4M1                EMPLOYEE SELECTION                05/10/93  08:31
SALES LEVEL: 6326XX MINNEAPOLIS DIVISION

      SELECT      EMPLOYEE #      EMPLOYEE NAME
      -
      X            81191          SMILLEN, D
      -            65801          ANDERSON, THEODORE
      -            67873          LINDGREN, VIRJEAN
      -            69286          GOUDEAULT, THOMAS
      -            71456          HUGHESDOW, MAROLD
      -            72194          HAMILTON, BRIAN
      -            73234          ADEMIMO, JOSEPH
      -            76335          LUKO, JAY
      -            77489          CHAN, MADE
      -            77519          FARMUN, AMY
      -            77946          ONISKIN, SALLY
      -            78033          ENGEL, MICHAEL
      -            78079          PELPHREY, MATTHEW
      -            822745        KARMOWSKI, KAREN
      -            824450        TEMPLIN, MARY
      -
PF1 - QUIT TO MENU                PF8 - REMOVE EMPLOYEE
PF9 - ADD/GOTO EMPLOYEE #         PF10 - PAGE BACKWARDS
                                     <MORE>

```

## MANAGING BACKROOM INVENTORIES

4. An instructional screen will be displayed. Press [ENTER] to display the following screen.

```

SIECTSH1      EMPLOYEE COUPON INVENTORY BY EMPLOYEE      05/18/93   08:31
SALES LEVEL: 6326XX MINNEAPOLIS DIVISION
EMPLOYEE: 65801 ANDERSON, THEODORE

```

COUPON CODE	DESCRIPTION	BACKROOM INVENTORY	CURRENT BALANCE	ISSUES(+) RETURNS(-)	UPDATE GOALS
000003	SAVINGS CTM \$1.00		-3469		
000004	SAVINGS CTM \$1.50				
000005	SAVINGS CTM \$2.00		10791		
000006	SAVINGS CTM \$2.50		-9950		
000007	SAVINGS CTM \$3.00		13328		
000008	SAVINGS CTM \$3.50		-4187		
000015	SAVINGS CTM \$4.00		8690		
000097	SAVINGS CTM \$4.50				
000093	SAVINGS CTM \$5.00		437		
000103	SAVINGS CTM \$5.50				
000104	SAVINGS CTM \$6.00				
000011	SAVINGS PK \$1.15				

NEXT EMPLOYEE  
 PF1 - QUIT TO EMPLOYEE SELECTION  
 PF3 - UPDATE  
 PF5 - MISC INVENTORY ADJUSTMENT  
 PF9 - GO TO COUPON CODE

PF2 - TRANSFER TO ANOTHER DIVISION  
 PF4 - TRANSFER TO ANOTHER EMPLOYEE  
 PF6 - ISSUES/RETURNS  
 PF10- PAGE BACKWARDS

<<MORE>>

5. To update coupon goals, enter the amount to "issue" or "return" and place an "X" in the UPDATE GOALS field. Press [PF3].

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6. If the update was successful, the message that goals have been updated will be displayed in a window. Press [ENTER] to close the window.

```

S15CT5N1      EMPLOYEE COUPON INVENTORY BY EMPLOYEE      03/18/93      09:31

SALES LEVEL: 6326XX MINNEAPOLIS DIVISION
EMPLOYEE: 65901 ANDERSON, THEODORE

COUPON      DESCRIPTION      BACKROOM      CURRENT      ISSUES(+)      UPDATE
CODE      INVENTORY      BALANCE      RETURNS(-)      GOALS

000003 SAVINGS C
000004 SAVINGS C
000005 SAVINGS C
000006 SAVINGS C
000007 SAVINGS C
000008 SAVINGS C
000013 SAVINGS C
000097 SAVINGS CTN $4.50
000093 SAVINGS CTN $5.00
000103 SAVINGS CTN $5.50
000104 SAVINGS CTN $6.00
000011 SAVINGS PK $1.5

                                437      _____      -
                                _____      -
                                _____      -
                                _____      -
                                _____      -

                                <MORE>>

PF1 - QUIT TO EMPLOYEE SELECTION
PF3 - UPDATE
PF5 - MISC INVENTORY ADJUSTMENT
PF9 - GO TO COUPON CODE

PF2 - TRANSFER TO ANOTHER DIVISION
PF4 - TRANSFER TO ANOTHER EMPLOYEE
PF6 - ISSUES/RETURNS
PF10 - PAGE BACKWARDS

```

- If the coupon is not linked to any handheld code, the window will display the message indicating that the goals cannot automatically be updated. Press [ENTER] to exit this window and to issue/return coupons.
- Division does not have an allocation for a specific brand/denomination, then that handheld code will not be setup ("linked" for your Division) and you will not be able to update Activity Goals for that brand/denomination.



## MANAGING BACKROOM INVENTORIES

7. If you try to update goals which have many handheld codes associated with them (i.e., all the different brands in the savings or full-price categories), then this window will display the handheld codes associated with this coupon.

```

SALES EMP COUPON CODE
000000 HH-Code      Begin      End      Hand Held      GOAL
000000 000100122  01/01/91 12/31/95  DORAL $2.00 CPN
000000 A00201651   12/30/91 01/01/95  DOR $2.00 CPN
000000
000000
000000
000000
000001
000009
000009
000010
000010
000011

PF1 to IGNORE      <Enter> to Continue
PF1 -
PF2 -
PF5 -
PF9 -
  
```

8. Divide the goals appropriately between handheld codes by keying in the amount. Please note the "begin" and "end" dates displayed when there are two identical descriptions. New handheld descriptions are often established with new quarters.
9. Press [ENTER] to complete the process.
- V. In cases where transfers between reps occur, a transfer form should be developed for sales reps to submit to the Promotion Coordinator. Anytime a transfer among personnel occurs, this form must be completed and sent to the Operations Units. Once received, this transfer should be noted by making the positive and negative entries under the appropriate reps' names in the CMS system.

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## MANAGING BACKROOM INVENTORIES

## COUPON TRANSFERS/RETURNS FORM

## COUPON TRANSFERS (FROM ONE REPRESENTATIVE TO ANOTHER)

FROM	TO		
Name/Div/Dist #	Name/Div/Dist #	Quantity	Description/Item #

## COUPON RETURNS TO WINSTON-SAL

Name/Div/Dist #	Quantity	Description/Item #/T-code

RA#

## MANAGING BACKROOM INVENTORIES

Transferring  
Coupons to Another  
Employee

1. With the Employee Coupon Inventory by Employee screen displayed, press [PF4] to obtain the TRANSFER COUPONS column.

```

SISCTSW1      EMPLOYEE COUPON INVENTORY BY EMPLOYEE      05/18/93  08:37
SALES LEVEL: 6326XK MINNEAPOLIS DIVISION
EMPLOYEE: 51191 SMILDEN, D
COUPON CODE    DESCRIPTION    BACKROOM    CURRENT
                INVENTORY     BALANCE
000003 SAVINGS CTN $1.00
000004 SAVINGS CTN $1.50
000005 SAVINGS CTN $2.00
000006 SAVINGS CTN $2.50
000007 SAVINGS CTN $3.00
000008 SAVINGS CTN $3.50
000015 SAVINGS CTN $4.00
000097 SAVINGS CTN $4.50
000093 SAVINGS CTN $5.00
000103 SAVINGS CTN $5.50
000104 SAVINGS CTN $6.00
000011 SAVINGS PK $ .15
                <MORE>
PF1 - QUIT TO EMPLOYEE SELECTION      PF2 - TRANSFER TO ANOTHER DIVISION
PF3 - UPDATE                          PF4 - TRANSFER TO ANOTHER EMPLOYEE
PF5 - MISC INVENTORY ADJUSTMENT      PF6 - ISSUES/RETURNS
PF9 - GO TO COUPON CODE              PF10- PAGE BACKWARDS
  
```

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## MANAGING BACKROOM INVENTORIES

7

2. The system will prompt you for the employee number of the employee you wish to transfer coupons to. Enter the number of coupons to be transferred by coupon. You do not have to enter a minus (-) sign.
3. When you have finished your entries, press [PF3] to update. A message will be displayed indicating that the record was updated. The employee's current balance will be decreased and the recipient employee's balance will automatically be increased.

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## MANAGING BACKROOM INVENTORIES

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~~Chapter 8~~  
Other CMS Procedures

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**OTHER CMS PROCEDURES****Reconciling Coupon Inventories**

- I. On a monthly basis, retrieve Coupon Management Detail report from the Print Report menu of SIS. Refer to chapter 4 of this Book for instructions.
- II. Compare the systems balance of the backroom inventory to what is actually in the backroom. Remember, no coupons are ordered to the backroom. However, from time to time, coupons may be returned or ordered in extreme cases, etc. This must be that starting point for any auditing procedure.
- III. Research any discrepancies such as:
  - returns to Winston-Salem reported via system
  - issuances not recorded in system
  - data error entry
- IV. Retrieve the coupon type and order number from the shipping tickets on file.
- V. Match the shipping tickets received during the month with entries in the Detail Report by order number, coupon type and employee. This matching process should uncover gaps, additions, etc. in CMS, if any exist.
- VI. Once reconciliation is complete, dispose of shipping ticket, order review screen printout and verification.

## Returning Active Coupons to W-S

### I. When returning unused/excess inventories of active coupons, the following procedures will be used:

- Only full rolls of active (unexpired) coupons may be returned.
- Sales reps will count the number of rolls/SKUs by item number and fill out the "coupon returns" portion of the Coupon Requisition form.
- With this information at hand, the sales reps will then call Promotion Coordinator, provide information and Coordinator will provide to the sales rep a return authorization (RA) number. This RA number must be included with returned coupon shipment.
- If necessary to expedite this process, the Coordinator will obtain a bulk list of RA numbers to utilize for reps. Contact Bonnie Chappell at (919) 767-9230.
- Sales reps must place RA number on form and on the shipping address label. A copy of this form should be included with the coupons and a copy sent to the Promotion Coordinator for adjustment in the CMS system.
- The shipment should be sent "freight collect" to the following address:

R.J. Reynolds Tobacco Company  
c/o Lentz Warehousing and Distribution  
5900 Grassy Creek Blvd  
Winston-Salem, NC 27105

- Coordinator utilizes form to update CMS appropriately.

### II. When returning unused obsolete coupons (expired dates, etc.) utilize the following procedure:

- Partial coupon rolls may be returned. An RA is not needed to return expired coupons.
- Again, sales reps will count the number of rolls/SKUs by item number and fill out the "coupon returns" portion of the Coupon Requisition form. It is not necessary to include an RA number to return obsolete coupons.
- Include a copy of the coupon return form in the shipment and send a copy to the Promotion Coordinator for adjustment in the CMS system.
- Send shipment "freight collect" to the following address:

R.J. Reynolds Tobacco Company  
c/o Lentz Warehousing and Distribution  
5900 Grassy Creek Blvd  
Winston-Salem, NC 27105

## Returning Obsolete Coupons to W-S

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## OTHER CMS PROCEDURES

Attn: Katie Young - For Counting and Disposal

- Coordinator updates return via the CMS system

III. Coupons which have been removed from product at retail should be destroyed by sales rep and reported appropriately via handheld computer by sales reps. Ensure that this is accomplished on a consistent basis.

Whether returning active or obsolete coupons, the SC must update CMS upon notification. To do so:

1. With the SIS Main Menu displayed, place an "X" beside "Management Summaries" and press [ENTER]. The following screen will be displayed. Place an "X" beside BACKROOM COUPON INVENTORY and press [ENTER].

```
GHCHGOMH                                MANAGEMENT SUMMARIES MENU                                93-05-18
                                                                                               08:40

- ACTIVITY SUMMARIES
- DAILY SALES REP DETAIL CALLS
- ACCOUNTS NOT CONTACTED SUMMARY
- CHAIN SUMMARIES
- ACTIVITY GOALS MAINTENANCE
X BACKROOM COUPON INVENTORY
- EMPLOYEE COUPON INVENTORY BY EMPLOYEE
- EMPLOYEE COUPON INVENTORY BY COUPON
- SALES REP COMMENTS
- VIEW EDITED SCAN DATA

ENTER 'X' NEXT TO ITEM YOU WISH TO SELECT

PF1 - RETURN TO SIS MAIN MENU
```

### Returning Coupons Via CMS

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## OTHER CMS PROCEDURES

2. An instructional screen will be displayed. Press [ENTER] to display the following screen.

```

SISCTIM1                BACKROOM COUPON INVENTORY                05/18/93 08:41
SALES LEVEL: 6326 MINNEAPOLIS DIVISION                MISCELLANEOUS ADJUSTMENT

COUPON CODE      DESCRIPTION      BACKROOM INVENTORY      MISC ADJUSTMENT
000003 SAVINGS CTN $1.00
000004 SAVINGS CTN $1.50
000005 SAVINGS CTN $2.00
000006 SAVINGS CTN $2.50
000007 SAVINGS CTN $3.00
000008 SAVINGS CTN $3.50
000015 SAVINGS CTN $4.00
000097 SAVINGS CTN $4.50
000093 SAVINGS CTN $5.00
000103 SAVINGS CTN $5.50
000104 SAVINGS CTN $6.00
000011 SAVINGS PK $1.15

PF1 - QUIT TO MENU                PF3 - UPDATE
PF4 - TRANSFER TO SALES OFFICE    PF5 - RETURN TO WINSTON-SALEM
PF6 - RECEIVE FROM SALES OFFICE  PF7 - MISCELLANEOUS ADJUSTMENT
PF9 - GO TO COUPON CODE          PF10 - PAGE BACKWARDS

                                NEXT EMPLOYEE
                                <<MORE>>
  
```

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## OTHER CMS PROCEDURES

3. Press [PF5]. The column will change to RETURN TO WINS-SALEM. Enter the number of coupons to transfer for each coupon code and press [PF3] to update the system with your changes.

DISCTINI		BACKROOM COUPON INVENTORY		05/18/93 08:41	
SALES LEVEL: 6326 MINNEAPOLIS DIVISION		RETURN COUPONS TO WINSTON-SALEM			
COUPON CODE	DESCRIPTION	BACKROOM INVENTORY	RETURN TO WINS-SALEM		
000003	SAVINGS CTN \$1.00				
000004	SAVINGS CTN \$1.50				
000005	SAVINGS CTN \$2.00				
000006	SAVINGS CTN \$2.50				
000007	SAVINGS CTN \$3.00				
000008	SAVINGS CTN \$3.50				
000013	SAVINGS CTN \$4.00				
000097	SAVINGS CTN \$4.50				
000093	SAVINGS CTN \$5.00				
000103	SAVINGS CTN \$5.50				
000104	SAVINGS CTN \$6.00				
000011	SAVINGS PR \$1.15				

PF1 - QUIT TO MENU  
PF4 - TRANSFER TO SALES OFFICE  
PF6 - RECEIVE FROM SALES OFFICE  
PF9 - GO TO COUPON CODE

PF3 - UPDATE  
PF5 - RETURN TO WINSTON-SALEM  
PF7 - MISCELLANEOUS ADJUSTMENT  
PF10 - PAGE BACKWARDS

NEXT EMPLOYEE

<<MORE>>

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---

**CMS Reports**

There are three reports available from the SIS Menu. These reports provide the ability to view details, to summarize data and to reconcile inventory. The reports can be customized by entering parameters on the report request screen. As with the activity summary, Sales Areas and Regions can get information on their Divisions by entering the appropriate number of "x's" in the sales level designation. For example, the designation to list all SASA Divisions would be "2XXX" and the designation to list all Division in the Winston-Salem Region would be "21XX." Each Division will be listed separately.

---

**Report Description  
and Request  
Parameters**

- **COUPON MANAGEMENT ACTIVITY DETAILS** which is used to view details by either (1) backroom or (2) employee for a range of dates specified in MM/DD/YY format. If you want the employee detail for one particular employee only, enter the employee's number in the requested field. If you want to report on all employees, leave this field blank. If you want to print all coupon balances even if there is no activity (issuances, placements, etc.) for the coupon during the date range, enter YES in the INCLUDE BALANCES field. Specify the desired number of copies. This report can be used to assist with physical inventory reconciliations because it details all transactions since the last inventory (specific dates can be specified).
- **COUPON MANAGEMENT INVENTORY REPORT** shows the current balance of backroom or employee coupon inventory. No activity is shown on this report. This report can be printed at anytime to show an employee what their current inventory balance is.
- **INTER-DIVISION TRANSFER REPORT** shows all "incoming" transfers awaiting receipt and transfers accepted into your Division inventory. It will not list the transfers you have made to another Division. The transfers made to another Division can be obtained on the Activity Detail Report.
- **COUPON PLACEMENT AND INVENTORY RECONCILIATION** shows the total number of coupons (by type) that were placed before the "inventory date" but not communicated until after the "inventory date". These placements were not reflected in CMS at the time of the inventory. Any "adjustments" to the balances in CMS from the physical inventory were misstated by these amounts. Therefore, you will need to "adjust" each employee's coupon inventory by the amount listed on the report.

---

**Requesting  
Summary and Detail  
Reports**

1. With the SIS Menu displayed, place an "X" beside Print Report and press [ENTER].
2. With the Print Report Menu displayed, place an "X" one of the following options:
  - Coupon Management Detail Report
  - Coupon Management Summary Report
3. The report request screen will be displayed. This screen will differ, depending on the report you selected.

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## OTHER CMS PROCEDURES

SISCTM1	PRINT REQUEST		03/16/93
	COUPON MANAGEMENT ACTIVITY DETAILS		09:57
DATE RANGE	FROM: 03/09/93 TO: 03/16/93 (Format MM/DD/YY)		
SALES-LEVEL	2326		
REPORT-TYPE	1 ( 1 - Backroom detail report; 2 - Employee detail report)		
EMPLOYEE	____ (For detail of only one employee on the employee detail report.)		
LIST ALL COUPONS	LY - Print all coupon balances even if no 'activity' occurred for coupon during date range.)		
DESTINATION	2326XX		
COPIES	1		
PF1 - RETURN TO MENU			

4. Enter the parameters as described above and press [ENTER] to request the report.

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## Requesting Reconciliation Reports

1. With the SIS Menu displayed, place an "X" beside Print Report and press [ENTER].
2. With the Print Report Menu displayed, place an "X" beside:  
- Coupon Placement & Inventory Reconciliation
3. The report request screen will be displayed.
4. If you want the employee detail for one particular employee only, enter the employee's number in the requested field. If you want to report on all employees, leave this field blank.

SECTION1		PRINT REQUEST		03/01/93 14:00	
COUPON PLACEMENT & INVENTORY RECONCILIATION					
DIVISION	2126				
INVENTORY DATE	02/15/93	(Format MM/DD/YY)			
SEQUENCE	1	( 1 = Coupons per Employee) ( 2 = Employees per Coupon)			
EMPLOYEE	(For detail on one specific employee)				
DESTINATION	2126XX				
COPIES	1				
PF1 - RETURN TO MENU					

5. Enter the parameters as described above and press [ENTER] to request the report.

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## OTHER CMS PROCEDURES

## DETAIL

Program: SISCTKR2  
Database: PROD

R.J. REYNOLDS TOBACCO COMPANY  
SIS COUPON MANAGEMENT

EMPLOYEE ACTIVITY DETAILS FOR THE PERIOD  
February 15, 1993 THRU March 08, 1993

DIVISION: XXXX - DIVISION X  
EMPLOYEE: 12345 WOOD, HOLLY

COUPON	COUPON DESCRIPTION	DATE	BEGINNING BALANCE	ISSUE/ (RETURN)	PLACEMENTS	TRANSF
000093	SAVINGS CTN \$5.00	02/15/93 02/15/93	0			
* TOTAL COUPON 000093			0	0	0	
UNPLACEMENTS:			0			
000012	SAVINGS PK \$2.0	02/15/93 02/15/93	0			
* TOTAL COUPON 000012			0	0	0	
UNPLACEMENTS:			0			
000013	SAVINGS PK \$.25	02/15/93 02/15/93	0			
* TOTAL COUPON 000093			0	0	0	
UNPLACEMENTS:			1			
000014	SAVINGS PK \$.30	02/15/93 02/15/93 02/19/93 02/22/93 02/22/93 02/23/93 02/23/93 02/24/93 02/24/93 02/24/93 03/04/93 03/04/93 03/04/93	0		(3,526) 3,000 (100) (110) (60) (1,803) (500) (90) (1,204) (300) (205)	
* TOTAL COUPON 000093			0	3,000	7,898	
UNPLACEMENTS:			0			

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## OTHER CMS PROCEDURES

## SUMMARY

Program: SISCTLR1  
Database: PROD

R.J. REYNOLDS TOBACCO COMPANY  
SIS COUPON MANAGEMENT - BACKROOM COUPON INVENTORY

DIVISION: XXXX - DIVISION X

COUPON	INVENTORY
000003 SAVINGS CTN \$1.00	13500
000004 SAVINGS CTN \$1.50	22500
000005 SAVINGS CTN \$2.00	59777
000006 SAVINGS CTN \$2.50	25500
000007 SAVINGS CTN \$3.00	122752
000008 SAVINGS CTN \$3.50	36800
000015 SAVINGS CTN \$4.00	18500
000012 SAVINGS PK \$.20	2985
000013 SAVINGS PK \$.25	25500
000014 SAVINGS PK \$.30	5000
000016 SAVINGS CTN \$.35	62500
000017 SAVINGS CTN \$.40	34000
000028 FULL PRICE CTN \$3.00	25000
000035 FULL PRICE CTN \$4.00	3456
000095 FULL PRICE CTN \$5.00	98765
000063 FULL PRICE 2 CTNS \$9.00	1234
000087 FULL PRICE 2 CTNS \$7.00	54321
000085 FULL PRICE 3 CTNS \$11.00	7654
000037 FULL PRICE PK \$.75	45323
000046 FULL PRICE PK \$.30	6443
000047 FULL PRICE PK \$.40	8876
000048 FULL PRICE PK \$.50	9761
000049 FULL PRICE PK \$.55	91857
000029 FULL PRICE 2 PKs \$.75	11564
000031 FULL PRICE 2 PKs \$1.25	11736
000050 FULL PRICE 2 PKs \$1.00	121333
000051 FULL PRICE 2 PKs \$1.50	9392
000040 FULL PRICE 2 PKs \$2.00	62593
000091 SALEM \$3/7/11 KIT OF 55	32192
000064 WINSTN \$3/7/11 KIT OF 55	12865
000092 WINSTON WALMART KIT	101689
000061 MIL FULL PRICE CTN \$2.00	22291
000062 MIL FULL PRICE CTN \$3.00	4432
000079 MIL FULL PRICE CTN \$4.00	2123
000084 MIL FULL PRICE CTN \$1.00	221
000088 CONS MISSN SAV PK CPN	835
000089 CONS MISSN FP PK CPN	5925
000090 CONS MISSN FP CTN CPN	1875

\*\*\*\*\* END OF REPORT \*\*\*\*\*

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## OTHER CMS PROCEDURES

Program: SISCTMR2  
Database: PROD

R.J. REYNOLDS TOBACCO COMPANY  
SIS COUPON PLACEMENTS & INVENTORY RECONCILIATION

DIVISION: XXXX - DIVISION X

COUPON	EMPLOYEE	PLACEMENTS
000006 SAVINGS CTN \$2.50	12345 H WOOD	7285
000007 SAVINGS CTN \$3.00	12345 H WOOD	6731
000012 SAVINGS PK \$.20	12345 H WOOD	500
000013 SAVINGS PK \$.25	23456 F STEIN	500
000014 SAVINGS PK \$.30	12345 H WOOD	6731
000028 FULL PRICE CTN \$3.00	12345 H WOOD 23456 F STEIN	7600 200
000050 FULL PRICE 2 PKS \$1.00	12345 H WOOD 23456 F STEIN 34567 C BARR	1200 7400 700

Note: The 'inventory date' is the date on which  
the physical inventory count was done.

The purpose of this report is to show the coupons that were  
placed before the 'inventory date' but not communicated until  
on or after that date. These placements were not reflected in  
CMS at the time of the physical count.  
Any adjustments to 'physical' will need to take the amounts  
shown above into consideration.

\*\*\*\*\* END OF REPORT \*\*\*\*\*

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## OTHER CMS PROCEDURES

Description	Coupon Code
SAVINGS CTN \$1.00	000003
SAVINGS CTN \$1.50	000004
SAVINGS CTN \$2.00	000005
SAVINGS CTN \$2.50	000006
SAVINGS CTN \$3.00	000007
SAVINGS CTN \$3.50	000008
SAVINGS CTN \$4.00	000015
SAVINGS CTN \$4.50	000097
SAVINGS CTN \$5.00	000093
SAVINGS CTN \$5.50	000103
SAVINGS CTN \$6.00	000104
SAVINGS PK \$.15	000011
SAVINGS PK \$.20	000012
SAVINGS PK \$.25	000013
SAVINGS PK \$.30	000014
SAVINGS PK \$.35	000016
SAVINGS PK \$.40	000017
SAVINGS PK \$.45	000096
SAVINGS PK \$.50	000094
SAVINGS PK \$.55	000105
SAVINGS PK \$.60	000106
FULL PRICE CTN \$1.00	000041
FULL PRICE CTN \$1.50	000042
FULL PRICE CTN \$2.00	000055
FULL PRICE CTN \$2.50	000043
FULL PRICE CTN \$3.00	000028
FULL PRICE CTN \$4.00	000035
FULL PRICE CTN \$5.00	000095
FULL PRICE 2 CTNS \$7.00	000087
FULL PRICE 2 CTNS \$9.00	000063
FULL PRICE 3 CTNS \$11.00	000085
FULL PRICE PK \$.30	000046
FULL PRICE PK \$.40	000047
FULL PRICE PK \$.50	000048
FULL PRICE PK \$.55	000049
FULL PRICE PK \$.75	000037
FULL PRICE 2 PKS \$.75	000029
FULL PRICE 2 PKS \$1.00	000050
FULL PRICE 2 PKS \$1.25	000031
FULL PRICE 3 PKS \$1.50	000051
FULL PRICE 5 PKS \$2.00	000040
SALEM \$3/7/11 KIT OF 55	000091
WINSTON \$3/7/11 KIT OF 55	000064
WINSTON WALMART KIT	000092
MIL FULL PRICE CTN \$1.00	000084
MIL FULL PRICE CTN \$2.00	000061
MIL FULL PRICE CTN \$3.00	000062
MIL FULL PRICE CTN \$4.00	000079
CONS MISSN SAV PK CPN	000088
CONS MISSN FP PK CPN	000089
CONS MISSN FP CTN CPN	000090

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Chapter 5  
Utilizing Canon Printer

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## UTILIZING THE COUPON PRINTER

### Summary

The handheld/coupon printer is a technological breakthrough that will give RJR Sales Representatives and Part-timers the ability to print savings coupons in each account.

### Hardware Components

The handheld/coupon printer units contain two separate pieces of hardware that communicate with each other to print coupons and report activities.

#### POQET COMPUTER

The Poquet Computer that will be used during the pilot contains a full screen display, keyboard, connector for communicating with the printer and the modem, batteries, on/off switch and memory cards.

The keys to be used on the hand-held computer for printing coupons and reporting activities are described below:

- **ARROW KEYS** - located on the bottom right hand side of the keyboard. There are four arrow keys that allow you to move the cursor left, right, up and down.
  - **LEFT ARROW KEY** located directly to the right of the space bar allows you to move the cursor to the left.
  - **UP ARROW KEY** located one key to the right of the left arrow key allows you to move the cursor up.
  - **DOWN ARROW KEY** located one key to the right of the up arrow key allows you to move the cursor down.
  - **RIGHT ARROW KEY** located one key to the right of the down arrow key allows you to move the cursor to the right.
- **BLUE P (POQET) KEY** located directly to the left of the space bar key allows additional PC functions to be performed when it is pressed in combination with other keys:
  - **P (POQET) KEY/PAGE DOWN** - Moves to the next page.
  - **P (POQET) KEY/PAGE UP** - Moves to the previous page
  - **P (POQET) KEY/HOME** - Moves to the beginning of the list
  - **P (POQET) KEY/END** - Moves to the end of the list
- **ENTER KEY** - accepts the letter or number entered beside each description on the screen and moves the cursor to the next description for entry.
- **NUMBER KEYS** - located across the top of the keyboard allow you to enter numbers beside the descriptions.
- **FUNCTION KEYS** - located directly above the number keys are designated F1, F2, etc. They perform special computer-related tasks when pressed.

## UTILIZING THE COUPON PRINTER

- ◆ **IMPORTANT** - By pressing the F1 function key you can access help screens which contain valuable information to help you use the handheld/coupon printer.

- **BACKSPACE KEY** - Located directly above the ENTER key allows you to backspace and erase numbers entered beside a description.
- **ESC KEY** - Moves to previous function screen.
- **P (POQET) KEY/F6** - By holding the Poqet key down and then pressing the F6 key, the screen contrast can be changed.
- **P (POQET) KEY/F7** - By holding the Poqet key down and then pressing F7 key, the screen contrast can be changed.

The keys described above are the only keys that will be used when using the Handheld/Coupon Printer.

### Coupon Printer

The printer unit contains two round spools, one for coupons and the other for VPRs. The unit also contains a battery, printer, and connector for communicating with the handheld.

To prepare the Handheld/Coupon Printer for use, release the handheld tray with a firm tug on the top edge and lay the tray down gently. Open the handheld unit by pressing the button located in the center of the handheld while lifting up. Turn the handheld unit on by pressing the I/O key located on the right hand side of the keyboard. Look at the screen on the handheld computer.

- a. If your screen has an A:\ displayed, type RJRT and press [ENTER]. Continue to step B.
- b. If your screen has two boxes displayed with the first box titled RJR Sales Information System, continue to the ACCOUNT SELECTION step.
- c. If options A and B did not apply, please call the Fastech Help Desk at 1-800-227-4242.

All activity reporting and requests for coupon printing will be recorded in the handheld computer by account. At the end of each day, the handheld computer will be connected to a modem for communicating all of your activity to the Winston-Salem host computer. Detailed instructions follow for using the new account reporting and communication software.

The new software also allows you to print coupons when a call is not being made. To do this, select PRINT COUPONS from the main menu and follow the instructions in this document. The coupons you print via this method will not be recorded.

### Operating Procedures

### Phase 2 Software Overview

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## UTILIZING THE COUPON PRINTER

### Account Selection

The first step is to locate the account you are calling on in the handheld computer. At the main menu screen use the up/down arrows to select Account Reporting and press [ENTER].

There are five methods available for locating an account. The selection method instructions are detailed for each selection. Use the up/down arrows to choose your account selection method and press [ENTER].

- **SELECT BY ROUTE NUMBER** - Displays accounts in route number sequence. Use the arrow keys to select an account or type a route number to reposition the cursor to the selected route number. After the correct account is highlighted, press [ENTER].
- **SELECT BY ACCOUNT NUMBER** - Displays accounts in SIS account number sequence. Use the arrow keys to select an account or type in the SIS account number to reposition the cursor to the selected account number and press [ENTER].
- **SELECT BY NAME** - Displays accounts in alphabetical order by name. Use the arrow keys to select an account or type in the name to reposition the cursor to the selected name and press [ENTER].
- **SELECT GENERIC** - Allows you to make a call for an account that has not been assigned an SIS account number. This is primarily used for new accounts. Type in the name of the account and press [ENTER].
- **SELECT OUT OF TERRITORY** - Allows you to make a call on an account that is not assigned to your territory. Type in the store name and account number and press [ENTER].

Additional keys are available for scrolling through the account list. They are as follows:

- Up arrow - up one line
- Down arrow - down one line
- Blue P (Poqet) key/page down - next page
- Blue P (Poqet) key/page up - previous page
- Blue P (Poqet) key/Home - top scroll list
- Blue P (Poqet) key/End - bottom of scroll list

The Store Activity screen now displayed allows you to verify the account selected by reviewing the information on the top of the screen. If the information is incorrect, return to the Account Selection screen by pressing [ESC] and reselect an account. If the correct account is displayed, use the arrow keys to select START CALL and press [ENTER].

The Call Procedures screen now displayed provides you with 6 account reporting sections. The following details the use of the each section.

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## UTILIZING THE COUPON PRINTER

## Print Coupons

Prepare the Coupon Printer for printing by following these steps:

1. Turn the Coupon Printer on by pressing the 1 side of the switch which is located on the top of the printer. The red light on the printer will blink one time when the printer has been turned on.
2. Load the blank roll of coupons into the printer unit as follows:
  - a. Pull the blank spool cover off of the large print spool located on the right hand side of the printer unit.
  - b. Place the blank coupon roll on the spool. The loose end of the roll should feed underneath the spool and towards the left side of the coupon printer.
  - c. Twist the FEEDER knob (located just below the on/off switch), counter clockwise to open the printer mechanism. Twist the knob until it stops.
  - d. Load the coupon roll into the printer by holding the loose end of the coupon roll with your left hand while guiding the coupon roll into the printer unit with your right hand until the coupons touch the inside edge of the printer. Allow one coupon to be visible on the left side of the machine where the printer coupons are dispersed.
  - e. Twist the FEEDER knob (referenced in step c) clockwise to close the printer mechanism back to its original position.
  - f. Place the black spool cover back on the large print spool located on the right hand side of the printer unit.
  - g. Press the form feed button which is the black button beside the red light located on top of the printer. This will advance the coupon roll one form and align the coupon with the printer.
  - h. You are now ready to print coupons!!

Use the arrow keys to select PRINT COUPONS and press [ENTER]. The computer will generate a list of the authorized Doral, Magna and Sterling coupon values. You may scroll through other coupon denominations by using the keys described above. Select the type of coupon you want to print and type in the number needed. **Multiple coupons denominations may be printed during one request.**

When all quantities have been entered for all coupon values, press [F10] to print. The computer will prompt you for your security code. Type 7121 and press [ENTER].

After a short pause, a new window named PRINT PROGRESS will appear with a message that gives you the coupon description and number left to print inside the window. The coupon printer should begin printing coupons and a counter of

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## UTILIZING THE COUPON PRINTER

the coupons left to print will be displayed. All denominations requested will be printed with a VOID coupon separating the coupon denominations.

When the printer is printing, you may interrupt the printing by pressing any key on the handheld computer. In this event, the message ABORT PRINT Y/N? will appear. To resume printing, press the N key followed by the [ENTER] key. To terminate printing, press Y followed by [ENTER].

If the printer runs out of coupons during printing, please follow the RELOADING instructions described later in this document.

When all coupons have been printed, the PRINT PROCESS window leaves and you are ready to make your next coupon printing request by repeating all of the instructions listed above.

All coupons printed are automatically recorded for placement into the handheld computer. Placement adjustments may be made by following the REPORT COUPONS/PREMIUMS instructions described later in this document.

Press [ESC] to return to the Call Procedures screen.

- ♦ **IMPORTANT:** When all coupons have finished printing turn the COUPON PRINTER OFF by pressing the 0 side of the switch which is located on top of the printer.

### Report Displays

Use the arrow keys to select REPORT DISPLAYS and press [ENTER]. The computer will generate a list of all authorized DISPLAYS and VPRs. You may scroll through other display denominations by using the keys described above.

Select the displays and VPRs that you want to report and type in the amount placed and press [ENTER]. A box will appear on the screen for selecting the type of payment. Select the payment type with the arrow keys and press [ENTER].

You may also type an "R" for a refused display in the amount placed column. A box will appear on the screen for selecting the type of refusal. Select the refusal type with arrow keys and press [ENTER].

- ♦ **Note:** Headquarter Payment and Draft Amounts are calculated and displayed across the bottom of the screen. When displays have been recorded with draft payments, you must review the Payment Verification/Draft Number section described later in this document before ending this call.

Press [ESC] to return to the Call Procedures screen.

### Report Coupons/ Premiums

Use the arrow keys to select REPORT COUPONS/PREMIUMS and press [ENTER]. The computer will generate a list of all authorized COUPONS and PREMIUMS. You may scroll through other coupon/premium denominations by using the keys described above.



**UTILIZING THE COUPON PRINTER**

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**Report POS**

Select the premium/coupon that you want to report and type in the number placed. Notice that any coupons already printed have the number printed in the placed column. Any placement adjustments should be made by retyping the number actually placed.

Press [ESC] to return to the Call Procedures screen.

Use the arrow keys to select REPORT POS and press [ENTER]. Use the arrow keys to scroll the different types of POS and type the number placed.

Press [ESC] to return to the Call Procedures screen.

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**Payment  
Verification/Draft  
Procedures**

Use the arrow keys to select PAY VERIFICATION/DRAFT PROCEDURES and press [ENTER]. All the DISPLAYS and VPRS that you previously recorded will appear on this screen. Verify that the information is correct. You may return to the REPORT DISPLAYS selection for correcting any errors. If a draft needs to be written, a cursor will appear in the lower right hand corner. Type in a valid draft number and press [ENTER].

Press [ESC] to return to the Call Procedures screen.

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**End Call**

Use the arrow keys to select END CALL and press [ENTER]. If a draft needs to be written and you have not recorded the proper information, a message will appear prompting you to go to the PAYMENT VERIFICATION/DRAFT PROCEDURES screen. If the draft information has been recorded properly, the END CALL will return to the ACCOUNT ACTIVITY Screen. Select START CALL to re-enter the current account selected or RETURN TO ACCOUNT SELECTION for selecting a new account for activity.

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**Communication**

Communication allows the information in your handheld unit to be transferred via the telephone lines to the Winston-Salem host computer for management reporting. The following instructions detail the steps for communicating your hand-held information successfully.

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**Modem Hookup**

Release the handheld unit from the coupon printer by applying slight upward pressure on the back edge of the handheld unit. The unit should disconnect from the handheld tray. The handheld unit must be disconnected from the handheld tray before communicating.

Prepare the Modem for use by following these steps:

1. Connect the black power cord into the back middle section of the modem and then plug the large end into an electrical outlet.
2. Plug the telephone cord received with the modem into the right most phone connection of the modem. The correct phone connection is marked TO JACK on the area just above the connection. Plug the other end of the telephone cord into a telephone outlet.

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## UTILIZING THE COUPON PRINTER

3. **OPTIONAL:** The other telephone line connection in the modem may be used with your telephone. When the modem is not in use, any incoming calls will pass through the modem and calls can be received normally.
4. Plug the male end of the ribbon cable into the left rear side of the modem and plug the remaining end into the Poqet computer connection located on the rear side of the Poqet computer adapter. Be sure that the 2 buttons on the front of the modem are out. If needed, press the buttons to change their position.
5. The Poqet computer and modem are now prepared for communication.

**WARNING: DUE TO HEAT GENERATED BY THE MODEM, DO NOT SET THE COMPUTER ON TOP OF THE MODEM DURING COMMUNICATIONS AND UNPLUG THE MODEM WHEN COMMUNICATIONS ARE COMPLETE.**

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**Daily  
Communication**

1. Follow the steps listed above for connecting the Poqet Computer and modem.
2. Make sure the modem is connected to an electrical outlet and receiving power by noticing the green lights lit on the front of the modem.
3. Turn on the Poqet computer by pressing 1/0 switch. The screen should display the main menu screen with Account Reporting and Communication as the two available options for selection. If this screen does not appear, follow the instructions in the Operating Procedures section to return to this screen.
4. Use the up/down arrows to choose COMMUNICATION and press [ENTER].
5. The CHANGE TERRITORY/EMPLOYEE NUMBER screen allows you to change the current territory and/or employee number. If the territory number is changed, all activities will be reported for the current territory and then the new territory accounts will be loaded into the Poqet computer for future activity. If the employee number is changed, the activities will be posted to the employee number just entered. Change the territory and/or employee number by overtyping the current information. When all changes have been made, press [F10] to continue.
6. A message will appear on the next screen that prompts you to connect the Poqet computer with the modem as instructed above. When you are finished, press [F10] to continue.
7. The phone number screen will appear that allows you to change the phone number for communication. The phone number is 1-800-352-2888. If the phone number is correct in the computer, no entry is necessary. Press [F10] to continue.
8. Different communication display windows will appear now. Your Poqet computer should communicate automatically from this screen and when

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**UTILIZING THE COUPON PRINTER**

complete, return to the main menu. If your Poqet computer remains on this screen for more than 2 hours, please contact the Fastech Help Desk at 1-800-227-4242 for assistance.

**Coupon Printer****Loading**

- a. Pull the black spool cover off the large print spool located on the right hand side of the printer unit.
- b. Place the blank coupon roll on the spool. The loose end of the roll should feed underneath the spool and towards the left side of the coupon printer.
- c. Twist the FEEDER knob (located just below the on/off switch), counter clockwise to open the printer mechanism. Twist the knob until it stops.
- d. Load the coupon roll into the printer by holding the loose end of the coupon roll with your left hand while guiding the coupon roll into the printer unit with your right hand until the coupons touch the inside edge of the printer. Allow one coupon to be visible on the left side of the machine where the printer coupons are dispersed.
- e. Twist the FEEDER knob (referenced in step c) clockwise to close the printer mechanism back to its original position.
- f. Place the black spool cover back on the large printer spool located on the right hand side of the printer unit.
- g. Press the form feed button which is the black button beside the red light located on top of the printer. This will advance the coupon roll one form and align the coupon with the printer.
- h. You are now ready to print coupons!!

**Reloading**

- a. Pull the black spool cover off the large print spool located on the right hand side of the printer unit.
- b. Twist the FEEDER knob (located just below the on/off switch), counter clockwise to open the printer mechanism. Twist the knob until it stops.
- c. Pull the used roll off the large print spool and any loose coupons out of the printer mechanism.
- d. Load a new coupon roll into the printer by holding the loose end of the coupon roll with your left hand while guiding the coupon roll into the printer using with your right hand until the coupons touch the inside edge of the printer. Allow one coupon to be visible on the left side of the machine where the printed coupons are dispersed.

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## UTILIZING THE COUPON PRINTER

- e. Twist the FEEDER knob clockwise to close the printer mechanism back to its original position.
- f. Place the black spool cover back on the large print spool located on the right hand side of the printer unit.
- g. Press the form feed button which is the black button beside the red light located on top of the printer. The coupon roll will not advance.
- h. Press any key on the handheld keyboard to continue printing.

The battery in the coupon printer unit may be recharged by using one of the following methods:

**Battery Maintenance**

1. Remove the battery from the coupon printer by pressing out on the two bottom latches located on each side the battery and pull the battery out. Unplug the battery from the coupon printer by pulling the plastic connectors apart on the black/red battery wires. Plug the plastic battery charger connector to the battery and plug the large adapter into any AC outlet in your home. Reinsert the battery into the coupon printer by connecting the plastic connector and sliding the battery back into the battery slot. The latches should snap shut around the battery when installed properly.
2. Plug the plastic battery charger into the adapter hole located on top of the printer unit and plug the large adapter into any AC outlet in your home. Complete battery charge takes 14 hours.

**Replacing the Batteries in the Handheld Unit**

1. Turn the computer off by pressing the I/O key.
2. Locate the area between the keyboard and the screen that has blue words and symbols. The plastic area that has the word MENU on one end and a bell shape at the other end contains the batteries.
3. Place your thumbs on the small tabs protruding from this area and lift up. This area should snap off exposing two AA batteries.
4. Replace the AA batteries with two Alkaline AA batteries noting the correct direction when placing batteries back into the unit. **You have 90 seconds to place the new batteries after the old ones have been removed.**
5. Replace the plastic cover by placing the back edge in to the unit while applying downward pressure on the front edge until it snaps back into place.
6. Turn the computer on by pressing the I/O key. Batteries should be replaced once every week.

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## UTILIZING THE COUPON PRINTER

### Cleaning the Printer Head

1. Twist the FEEDER knob (located just below the on/off switch) counterclockwise to open the printer mechanism. Twist the knob until it stops.
2. Take a cotton swab and dip into a bottle of alcohol.
3. Lightly rub the cotton swab back and forth across the printer head approximately 10 times. The printer head is located along the leading edge (gold area) of the area lifted with the FEEDER knob.
4. Twist the FEEDER knob clockwise to close the printer mechanism back to its original position.

### Disconnecting the Handheld Unit from the Handheld Tray

1. While holding the handheld, apply slight upward pressure on the back edge of the handheld unit. The unit should disconnect from the handheld tray.

### Connecting the Handheld Unit to the Handheld Tray

1. Place the tab located on the front bottom edge of the handheld unit into the slot on the tray and press the back of the unit down until it snaps into place. The unit should not rest secure on the handheld tray.

The handheld unit contains two memory card trays located on the lower side of each end of the handheld computer. This handheld will not function if the card is removed or the tray is not placed in the proper position. It is recommended that the Memory Card Trays not be tampered with to ensure smooth operation of your Coupon Printer/Handheld Unit.

The following represent items to check when you have a problem. Again, do not hesitate to call the Fastech Help Desk at 1-800-227-4242.

- If the handheld shuts off automatically, press the I/O key to turn the unit back on.
- If you receive a message BATTERY TOO LOW TO CONTINUE switch to the second coupon printer battery. If one is not available, you cannot continue to print.
- If you receive a message HANDSHAKE ERROR or INVALID STATUS, press [ENTER] on the handheld to clear the error message and switch the printer off for 10 seconds and then turn it back on. This should correct the problem.
- If the coupon printer jams while printing, reload the coupon printer using the RELOAD instructions above.

If you encounter a problem with the handheld/coupon printer that you cannot correct, please contact the Fastech Help Desk at 1-800-227-4242. They will be happy to help you correct the problem.

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### Memory Card Trays

### Troubleshooting

### Help Desk Support